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National Survey for Wales, 2013-14 Digital Inclusion re-contact survey



Digital Inclusion Report

**Jane Thompson, David Vivian, Jessica Huntley Hewitt,
Alex Pearson, IFF Research**

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information please contact:

National Survey team

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

Tel: 029 2082 6345

Email: surveys@wales.gsi.gov.uk

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Summary

Being online offers benefits such as combating isolation, saving money and quick and easy access to services, which those who do not use the internet are at risk of missing out on. The National Survey for Wales 2013-14 found that one fifth (21 per cent) of Welsh adults were digitally excluded i.e. they did not use the internet.

Four hundred telephone interviews, lasting approximately 15 minutes each, were conducted in February 2015 among a sub-sample of those who had been identified as digitally excluded by the National Survey. This report focuses on this further research, which was commissioned to:

- provide more detail on the profile of internet users / non-users (who are using the internet now, and how),
- measure the full extent of any barriers to internet use and how these interact (including to what extent a lack of awareness of the benefits and uses of the internet plays a part),
- make recommendations / check thinking on what could encourage different groups of non-users to get online.

Unlike the National Survey for Wales, which asked a number of high level questions about use of the internet as part of a much larger survey on a variety of topics, this research focused on finding out why people didn't use the internet. The more in-depth questioning used was able to draw out additional information about the multiple barriers that people face and provide a more comprehensive understanding of the reasons behind being digitally excluded.

Almost a quarter (24 per cent) of those interviewed, now consider themselves to be users of the internet – having become internet users in the period since

their participation in the National Survey between 11 and 22 months previously. This suggests that progress continues to be made against Welsh Government digital inclusion targets.

Most new users access the internet by home broadband (82 per cent), with two in five using a mobile internet connection (40 per cent). Former users – the 12 per cent of those interviewed who have used the internet in the past but no longer do so – are less likely than new users to have accessed the internet via these methods or by WiFi connections in public places and more likely to have used dial-up connections or used the internet at work. This suggests that poor access (the slower speed of dial up compared with broadband) or a dependence on others for devices and connections can play a role in former users stopping using the internet.

Most of those who have ever used the internet can do so with no help (22 per cent) or with only occasional help (39 per cent). Within this group of those who have ever used the internet¹, former users are more likely than new users to have had someone controlling the computer for them, suggesting that this method of support does not foster further independent use.

New users are still building confidence, with a good proportion feeling confident using a keyboard and mouse (70 per cent) and searching for or looking at information (75 per cent) but only slim majorities are confident about using a touchscreen (57 per cent) and email (53 per cent). As only just over half (55 per cent) of those who have used the internet would be happy to learn how to do new things on the internet through ‘trial and error’, there is a clear need for continued support for new users (as well as support for non-users to get them to try going online for the first time). Similarly, as fewer than one in three new users feel confident setting up a home broadband connection or new device such as a computer, laptop, tablet or smartphone,

¹ This group consists of all those who have ever used the internet whether or not they currently do so – it therefore consists of new users (who use the internet currently) plus former users (who do not use the internet currently but have done so in the past).

there is a need for any support available here to be publicised to new users as well as non-users (without it, there is a risk that loss of a connection or device could result in new users stopping using the internet).

The key barriers to internet use are a lack of interest or perceived lack of need (78 per cent each), followed by a lack of skills (55 per cent), with significant proportions also stating privacy and security concerns (41 per cent), cost (33 per cent), a lack of convenient access (24 per cent) and health and vision difficulties (22 per cent). In addition, small proportions of non-users faced literacy (9 per cent) or language (3 per cent) barriers.

Most non-users face multiple barriers to using the internet and so it can be helpful to group the barriers further into broad categories – a lack of interest, 'soft' constraints and 'hard' constraints.

A lack of interest or need is a factor in not using the internet for a full nine in ten non-users (91 per cent). This is likely to put them off seeking help to overcome any further constraints they face and is reflected by the fact that awareness of existing sources of help is low. This indicates that a proactive approach is likely to be needed when targeting non-users, with outreach work seeking them out at places they already visit. It also indicates the key role communicating the benefits of the internet must play. Although even non-users are able to perceive some benefits of using the internet, outreach activities could work to make non-users appreciate a wider range of benefits and to highlight the relevance of benefits to each individual in particular (which may include finding the one particular catalyst which can act to 'unlock' an individual's interest, or giving practical examples of simple things which can be done safely online as a starting point). Lack of interest and motivation amongst many non-users need to be addressed before they would be willing to learn advanced functions.

‘Soft’ constraints such a lack of skills, privacy or security concerns or a lack of help, affect three quarters (75 per cent) of non-users, however these constraints are arguably the most easily overcome with external help or peer support. The IT literate should be encouraged to help their friends and family who do not use the internet with basic skills, and programmes and facilities available to help people with the internet need to be better publicised as there is a low level of awareness of these resources. To be most effective, such help should focus on enabling non-users to access the internet themselves rather than doing tasks for them. For the majority of non-users very low confidence levels need to be initially addressed by one to one support in the most basic aspects of using computers and going online. However, it is also crucial that *new* users are not forgotten in the help on offer, as continued support will help build confidence and reduce the risk of them stopping using the internet.

Whether through peer support or more formal sessions, it is particularly important that any training of those starting out online addresses privacy and security concerns as such concerns may act to limit the perceived relevance of certain benefits of the internet such as online shopping and saving money by being able to access cheaper deals online. Reassurance from financial institutions, online retailers and service providers on their fraud prevention measures and independent guidance on safe online banking and shopping practices may help.

Over half (56 per cent) of non-users face a ‘hard’ constraint which stops them from using the internet such as cost, health difficulties or literacy barriers. In the case of costs specifically, raising awareness of the price of affordable laptops and tablets is likely to be beneficial as many non-users believe them to be more expensive than they actually are. Assistance with costs would also be welcomed by some – this could take the form of a credit union loan for example, to reduce the impact of upfront costs, which are on average more of a constraint for non-users than paying a monthly connection fee. Promoting venues where access is free should focus on reaching those who have never used the internet before as former users are more likely to

already be aware and / or not require free access. In terms of literacy barriers, any text-based learning materials such as written guidance notes or online tutorials should be reviewed to check that they use large enough font and simple language.

Finally, it must be acknowledged that to target outreach work effectively in a climate of limited resources, there is a conversation to be had on which non-users can realistically be considered 'reachable'. A decision on who to target outreach work towards should consider not only the existing priority groups (those in social housing, with a limiting illness, the unemployed and over 65s) but also attitudinal barriers and how these interact.

There is a clear difference in attitudes and behaviour by age. Those aged under 65 are more likely to have become new internet users since the taking part in the National Survey. Non-users of this age group are more likely than those who are older to face cost, literacy or health barriers to using the internet but are more likely to be interested in using the internet in the future, suggesting that the removal of practical barriers should be the focus for intervention with this age group.

Amongst those 65 or over, increasing the motivation of non-users is essential if any behaviour change is to happen. This is particularly the case among the over 75s, who have much less interest in using the internet in future (only eight per cent interested compared with 22 per cent of 65 – 74s and 29 per cent of under 65s).

1 Introduction

1.1 Background and Aims

As everyday services and communications have increasingly moved online, and the majority of people have become accustomed to operating within this digital world, there is a risk that some of the most vulnerable groups in society could be left behind. Despite the fact that the proportion of non-users has reduced over time, in part down to Welsh Government initiatives such as Communities 2.0, one fifth (21 per cent) of Welsh residents aged 18 and over do not currently use the internet and thus remain excluded. These individuals are at a significant risk of missing out on the benefits of being online such as easier, quicker and cheaper access to local and central government services (driven by the UK Government's Digital by Default agenda), cost savings through being able to access price comparisons and online deals, and the joy of being able to connect with friends and family online (combating isolation).

The National Survey for Wales 2013-14 was able to identify who the digitally excluded are: they are more likely to be over 65, to live in social housing, or to suffer from a lifelong limiting illness, but this latter group also includes all ages and backgrounds.

The Welsh Government is committed to continue reducing digital exclusion going forwards, with revised targets of 18 per cent by 2015 and 13 per cent by 2017². This will be achieved through Digital Communities Wales, the new digital inclusion programme which replaces and builds upon Communities 2.0, which ended in March 2015. Digital Communities Wales will encourage and support digitally excluded individuals to take advantage of the benefits of digital technologies by working with partners across sectors to co-ordinate digital inclusion activities throughout Wales; and by up-skilling individuals, both directly, via targeted community outreach, and indirectly, using a train the trainer approach.

² Digital Inclusion Delivery Plan – Update 2014

Groups already targeted for intervention include those mentioned above (aged over 65, living in social housing, and with lifelong limiting illnesses) as well as the unemployed³, who make up a small proportion of the digitally excluded group as a whole, but are perhaps the most likely to be disadvantaged by a lack of digital engagement.

In order to successfully target these key groups, it is important for the Welsh Government to understand in more depth the reasons why those identified as digitally excluded do not use the internet. Previous studies have shown that non-users can be split into two broad groups, described as the 'digitally isolated' (who choose to be digitally disengaged) and the 'digitally excluded' (who are disengaged due to a constraint in their circumstances). The National Survey for Wales [Digital Inclusion report 2012-13](#) found that among all non-users, for two-thirds this was due to personal choice, and one-third were constrained by circumstances. Among those constrained by various barriers, lack of skills was found to be the largest factor, followed by financial and cost restraints and health reasons; however, data was not collected on the reasons why the 'digitally isolated' group chose not to engage.

The 2013-14 National Survey asked all those not using the internet their reasons for not doing so (multiple responses allowed); this again revealed that personal choice was the reason for the majority, with 61 per cent saying they didn't *want* to use the internet and 40 per cent saying they didn't *need* to use the internet. In line with the previous year, specific barriers such as lack of skills, equipment and access costs and health problems were also mentioned.

In order to explore and understand the reasons preventing people from using the internet in more detail (including the full extent of each barrier and how they interact), the Welsh Government commissioned research as a follow up to the National Survey for Wales 2013-14, based on re-contacting those that had been identified as not using the internet. In addition, the research aimed to:

³ Digital Inclusion 2012-13 report

- Discover if any of the digitally disengaged had become internet users in the intervening period since the initial interview
- Explore awareness of the benefits and uses of the internet
- Generate ideas / check thinking on what could encourage different groups of non-users to get online

Unlike the National Survey for Wales, which asked a number of high level questions about the internet as part of a much larger survey, this research focused on the internet. The more in-depth questioning used was able to draw out additional information about the multiple barriers that people face and provide a more comprehensive understanding of the reasons behind being digitally excluded.

1.2 Approach

400 telephone interviews were conducted with those who were identified as not using the internet. Interviews lasted approximately 15 minutes, and were conducted between 5th and 27th February 2015.

The 2013-14 National Survey identified 4,038 non-users of the internet, of whom 1,877 agreed to be re-contacted for further research. Those available for re-contact had completed the National Survey between 11 and 22 months prior to the start of fieldwork in February 2015.

The unemployed and under 65s were over-sampled to ensure robust base sizes for conducting sub-group analysis. The data were weighted prior to analysis to match the profile of the entire population of the digitally excluded. Further details on this can be found in the Technical Appendix, along with more details on the population and sample profiles, response rates, and the approach to Welsh language interviews.

1.3 Profile of research participants

Those participating in the research tended to be above working age (69 per cent were aged 65 or older at the time of the 2013-14 National Survey), and a relatively high proportion (50 per cent) lived with a lifelong limiting illness. More than a quarter (28 per cent) were living in social housing, while only a small proportion (two per cent) were unemployed (the majority being economically inactive).

A substantial amount of crossover existed within the key groups. For example, when looking at the weighted survey population, those aged under 65 are more likely to be in employment (35 per cent compared with 12 per cent overall) and to live in social housing (39 per cent compared with 28 per cent overall).

Of those who have a limiting illness, the majority are also in the over 65 age group (73 per cent) and almost half are in the 75+ age group (47 per cent). There is also considerable crossover between those who have a limiting illness and those living in social housing, with three-fifths (61 per cent) of the latter group also being in the former. Finally, almost all of those with a limiting illness (98 per cent) were also not in employment⁴ (and they made up more than half (56 per cent) of all respondents not in employment).

Employment is also associated with a higher level of qualifications achieved: those in employment were more likely to have a level 2 qualification or above (55 per cent).

1.4 Structure of the report

The report is organised as follows. The next chapter (Chapter 2) discusses who has started using the internet since taking part in the 2013-14 National Survey and considers the profile of new users and non-users, including their confidence and support needs, and how they access the internet. The third chapter discusses the barriers to internet use and how these may be overcome. The fourth chapter concludes the report. Appendix A contains a

⁴ Including those who were retired, unemployed or economically inactive

technical report, giving more detail on the sampling and weighting procedures, response rates, approach to including Welsh speakers and including a comparison with the 2013-14 National Survey on barriers to internet uses.

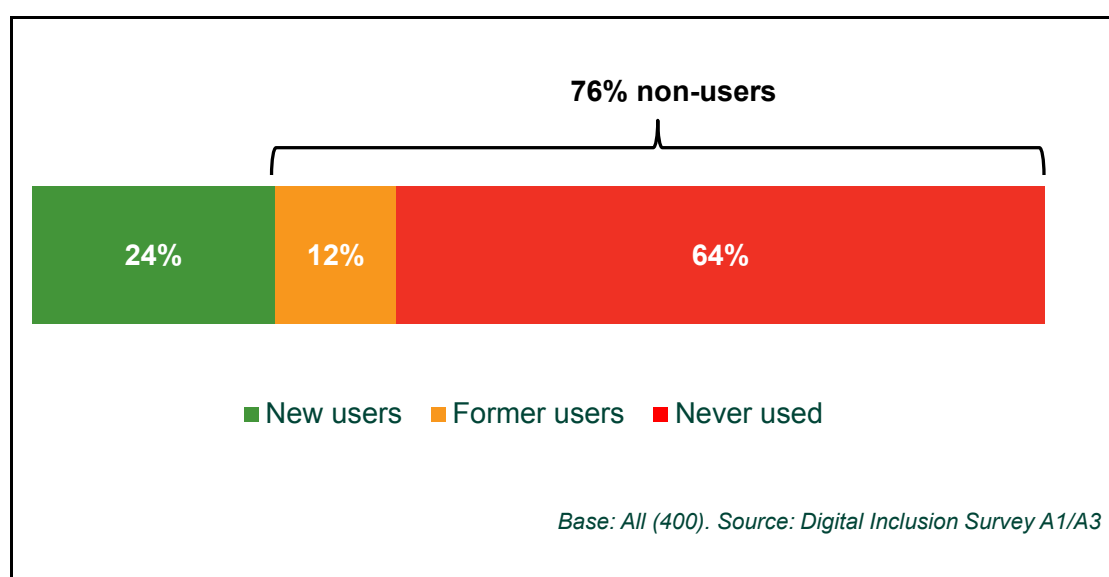
2 Profile of non-users and new users

2.1 Use of the internet

The 2013-14 National Survey for Wales found that 18 per cent of adults aged 18 and over had never used the internet and that 21 per cent of people did not personally use the internet at the time of the survey (indicating that three per cent had used the internet at some point in the past but no longer did so). Among those interviewed in the re-contact survey discussed in this report (a sub-sample of those not using the internet at the time of the initial survey), almost a quarter (24 per cent) are now using the internet (new users), and a further 12 per cent have used the internet at some point but are not currently doing so (former users), with the remainder (64 per cent) having still never used the internet.

Together these latter two groups (former users and never used) constitute the 76 per cent of those interviewed who do not currently use the internet, referred to throughout this report as non-users.

Figure 2.1 - Level of internet use



The fact that 24 per cent of non-users previously identified in the National Survey have since become internet users, suggests that progress continues to be made against Welsh Government digital inclusion targets. Although there is a caveat that those choosing to participate in a survey specifically about internet use may have been more likely than the average non-user to have since engaged with the internet, and it should also be noted that some current users at the time of the National Survey may have stopped going online since, this is still an encouraging finding.

2.1.1 New users

Although the 26 per cent of those interviewed who now use the internet are drawn from a number of different sub-groups, they are much more likely to have some characteristics than others.

Employment is a key differentiator with those in employment twice as likely as those who are not in employment to now be using the internet (44 per cent compared with 21 per cent) - employment may provide access and training and / or require internet use as part of the job.

Younger people were more likely to be now using the internet (58 per cent of the under 45s and 33% of those aged 45 - 64 compared with 18 per cent of those 65 or older).

Those with higher level qualifications were also twice as likely to be now using the internet as those with lower level qualifications or no qualifications (31 per cent of those with a Level 2 or above qualification compared with 16 per cent).

2.1.2 Non-users

The profile of the digitally excluded (the 76 per cent of those interviewed who do not currently use the internet) shows the following groups are more likely to be non-users:

- Those not in employment (79 per cent currently not using the internet compared with 56 per cent of those in employment);
- Older people (84 per cent of those aged 75 or over and 78 per cent of those 65-74 do not currently use the internet compared with 62 per cent of those aged under 65);
- People with no qualifications at Level 2 or above (84 per cent do not currently use the internet compared with 69 per cent of those more qualified).
- Those with a limiting illness (82 per cent do not currently use the internet compared with 70 per cent of those without such an illness).

Within the non-user group women were more likely than men to have never used the internet at all (89 per cent of women who do not currently use had never used compared with 78 per cent of men), as were those aged over 75 (93 per cent of those who do not currently use had never used compared with 80 per cent of those aged 65-74 and 71 per cent of those under 65).

There are possibly access issues for the more deprived, as those who were not current users and are more deprived⁵ were more likely to have used the internet at some point but not be doing so currently (20 per cent compared with nine per cent of those less deprived).

2.2 Support and confidence

It is widely acknowledged that internet use / non-use is not a binary variable and there are many ways in which use can be classified – by frequency, confidence and range of tasks undertaken as well as whether use is facilitated by proxies or undertaken alone. This research used a simple definition of use / non-use to allow those who considered themselves non-users to talk in a

⁵ Living in an area in the bottom 2 quintiles according to the Index of Multiple Deprivation.

meaningful way about their barriers to internet use, but it is important to remember that new users often also have considerable support needs and it is ongoing support which can prove crucial.

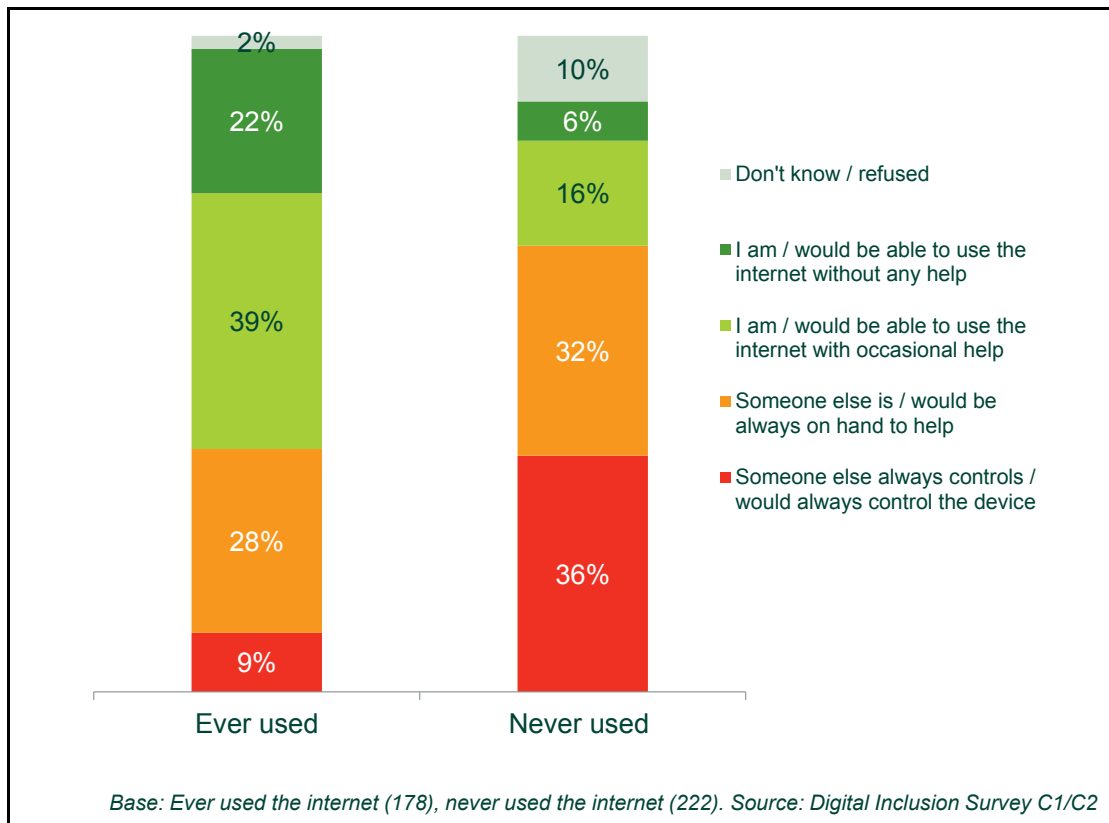
Whether people have ever used the internet at all clearly has a bearing on confidence and required support, so this section largely focuses on the views of those who have used the internet at any point (referred to as “ever used”) and those who have never done so (referred to as “never used”), rather than whether they are current users or not.

2.2.1 Help required

A majority of those who have used the internet at some point⁶ can do so with either no help (22 per cent) or only occasional help (39 per cent), and only around one in ten (nine per cent) of those who have used the internet actually have someone else controlling the computer for them, although a further 28 per cent always have someone else on hand to help if needed. Former users were far more likely than those who use the internet currently to have had someone else controlling the computer for them (20 per cent compared with three per cent), possibly indicating that this method of support does not foster further independent use.

⁶ New users and former users.

Figure 2.2 - Help required when using internet



As would be expected, the proportion of those who have never used the internet who believe they would require support to do so is higher: only 23 per cent believe they could do so with no help (six per cent) or only occasional help (16 per cent), indicating that, for the vast majority of those who have never used the internet, support is an issue. A third (32 per cent) would need someone to always be on hand and a further 36 per cent think they would need someone to control the computer for them. A relatively high proportion of non-users (10 per cent) were unable to answer the question, uncertain even about picturing the type of help they might need.

Amongst those who have never used the internet, just a little support could make a greater difference for those in the 65-74 age bracket – they were more than three times as likely as those older, and almost twice as likely as those younger to think they would only need occasional help (31 per cent compared with nine per cent of those 75 or over and 16 per cent of those aged under 65). The oldest of those who had never used the internet (aged

75 or over) were particularly likely to think they would need someone to control the computer for them (43 per cent compared with 23 per cent of 65-74 year olds and 35 per cent of those under 65). The support needs of younger non-users (who often face specific circumstances limiting their ability to use the internet, as discussed in section 3.1.2) make them closer to the very oldest non-users than to those aged 65-74.

Amongst those who had never used the internet the more qualified (those with level 2 qualifications or above) were almost as likely as the less qualified to think they would need support (63 per cent and 71 per cent respectively would need someone to control the computer or always be on hand) but amongst those who have used the internet there was a marked difference with the more highly qualified less likely to want assistance (26 per cent of those with Level 2 qualifications or above compared with 44 per cent of those with lower level or no qualifications wanted someone to control the computer or always be on hand). The experience of using the internet appears to give those with more qualifications the confidence to continue using the internet with less support, while those who are less qualified prefer longer term support.

2.2.2 Confidence in using the internet and setting up access

Even amongst those who have used the internet, there is little confidence in being able to set up a new device such as a computer, laptop, tablet or smartphone (23 per cent confident) or in setting up a home broadband connection (28 per cent confident). Loss of a connection or device could therefore easily result in new users ceasing to use the internet. Any help available with setting up equipment and connections should therefore be publicised to new users as well as non-users (so that the former know where to turn if needed).

Amongst those who have used the internet, compared with connection and equipment set up, a higher proportion feel confident in using a keyboard and mouse (70 per cent) or a touchscreen (57 per cent); although relatively new

touchscreen technology is still an area of concern for many, with 40 percent stating they do not feel confident, indicating they may still require support.

Three quarters of those who have used the internet to search for or look at information (75 per cent) are confident in doing so, but 18 per cent remain not at all confident. Similarly 53 per cent are confident about email but 34 per cent remain not at all confident, indicating further support or practice may be required. However only just over half (55 per cent) of those who have used the internet would be happy to learn how to do new things on the internet themselves through 'trial and error'.

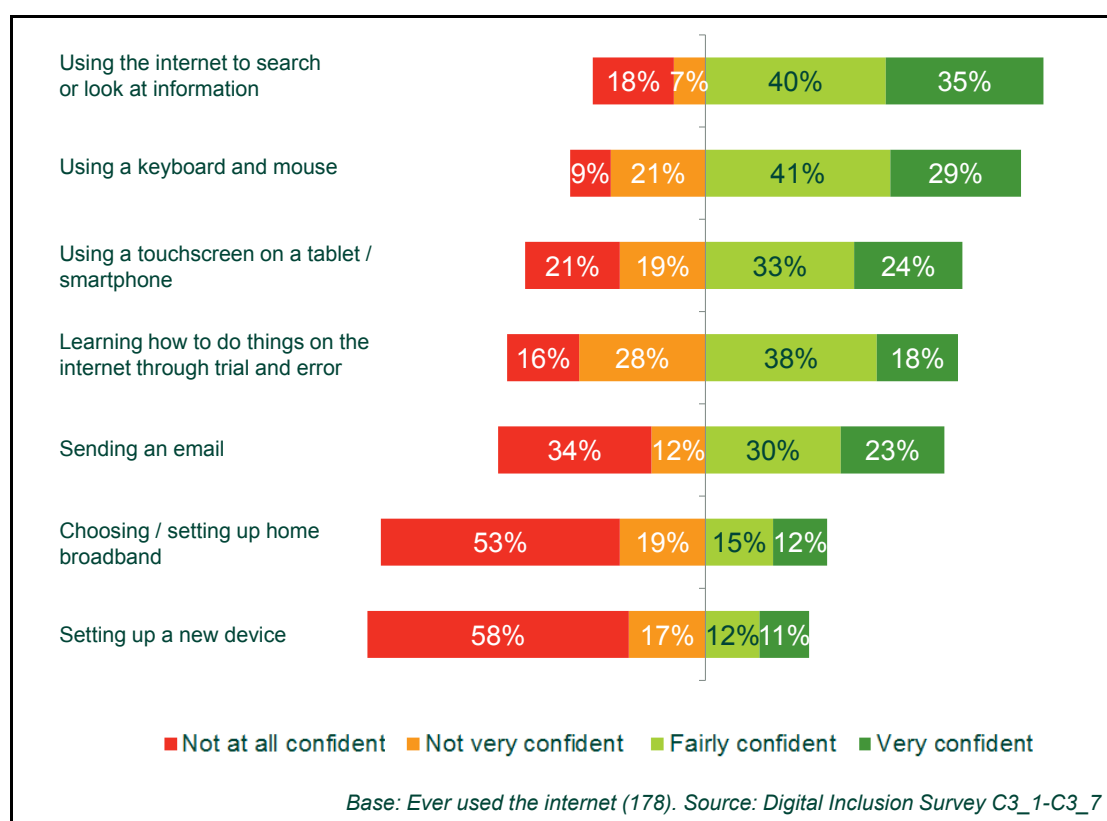
Amongst those who have ever used the internet, whether they are currently doing so or not, the socially disadvantaged are less likely to be confident: with 40 per cent of those living in social housing and 33 per cent of those more deprived⁷ not confident about using the internet for searching for / looking at information compared with 20 per cent of those not in social housing and 16 per cent of those less deprived⁸. Illness also affects confidence with 33 per cent of those with a limiting illness not confident compared with 19 per cent of those without.

As would be expected, those who have never used the internet felt they would be less confident at each type of task than those who have used it. For example, amongst those who have never used the internet only 18 per cent would be happy to have a go at learning through 'trial and error'. Although this rises to 41 per cent amongst those who are interested in using the internet there is still a clear need for offline support to get this group to try going online.

⁷ Defined as those in the top two quintiles of the Welsh Index of Multiple Deprivation, as in the National Survey for Wales

⁸ Defined as those in the bottom two quintiles of the Welsh Index of Multiple Deprivation, as in the National Survey for Wales

Figure 2.3 - Confidence in using / setting up the internet



2.3 Accessing the internet

A home broadband connection is by far the most common way new users are accessing the internet (82 per cent). A further one per cent are using home dial-up connections and four per cent are using a home connection but are unsure about its nature – in total 85 per cent are using some form of home connection. The second most common mode of access is a mobile internet connection (used by 40 per cent). A minority are using Wi-Fi connections in public venues (12 per cent), and / or facilities in public venues (11 per cent) whilst only very small proportions are using internet connections at work (four per cent) or at an education establishment (one per cent).

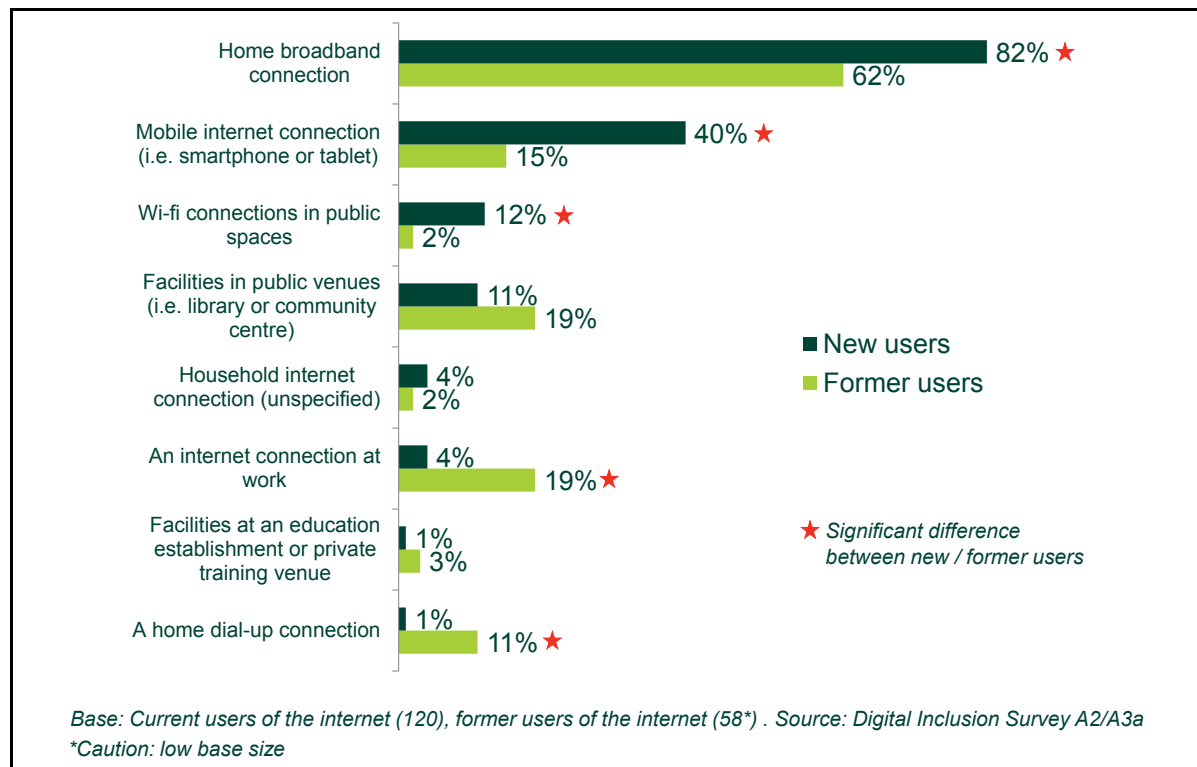
Amongst those who had used the internet but are not currently doing so a home broadband connection was still the most frequent method to access the internet but was far less common (62 per cent rather than 82 per cent amongst new users), whilst older dial up connections were more likely to have

been used by this group (11 per cent compared with one per cent of new users). Overall, only 66 per cent of former users have had a home connection compared with the 85 per cent of new users indicating that a substantial proportion did not have long term access to the internet and may not have used the internet frequently.

Former users were also less likely to have used a mobile connection (just 15 per cent did so compared with 40 per cent of new users) and / or WiFi connections in public places (just two per cent did so compared with 12 per cent of new users). This may indicate they do not own smartphones or other devices which they can use to access the internet in this way, and again that they did not have easy access available most of the time.

Former users were more likely than new users to have accessed the internet at work (19 per cent did so compared with just four per cent of new users). This suggests they were dependent on others for both devices and access.

Figure 2.4 - Access routes of new and former users

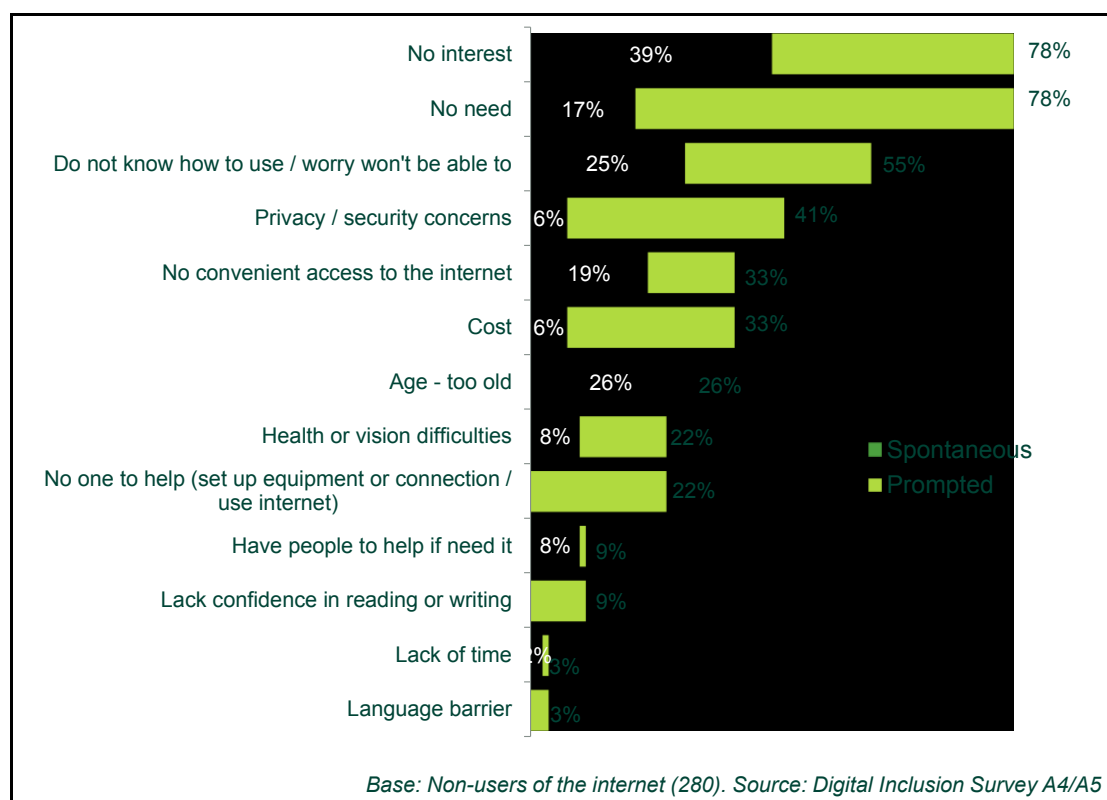


3 Overcoming barriers to internet use

3.1 Overview

The digitally excluded do not access the internet for many different reasons. Figure 3.1 shows the barriers (spontaneous and prompted mentions) to online use among those not currently using the internet.

Figure 3.1 - Barriers to getting online



3.1.1 Barriers stated to online use: spontaneous

The barrier most frequently cited spontaneously was a lack of interest (39 per cent), while perceived lack of need was also commonly mentioned (17 per cent). It can be argued that there is little real distinction between these two stated barriers as both represent a lack of motivation or 'pull' to go online. It also feels helpful to consider those citing 'lack of time' (two per cent) and 'have people to help if need it' (eight per cent) as part of the same broad category, and a proportion of those spontaneously mentioning that they are

just too old (26 per cent in total) are also likely to belong here (although it is likely that others in this category moved to 'health or vision difficulties' after prompting).

Lack of skills is also a key reason for not going online for a significant proportion of non-users, with 25 per cent spontaneously mentioning that they do not currently use the internet because they do not know how to or worry that they will not be able to.

Fourth most common as an initial response were comments to do with a lack of convenient access, mentioned by 19 per cent of non-users, including mentions of 'haven't got a computer' (14 per cent) and no internet access / very bad access (seven per cent). Cost was mentioned explicitly by a relatively small number upfront – just six per cent - although, as explored later in this report, some of those who have no equipment or connection are in this position due to cost concerns.

3.1.2 Barriers stated to online use: prompted

Prompting the digitally excluded with reasons why they may not use the internet, with which they could agree or disagree, significantly enriches our understanding of the true barriers to going online, as it allows non-users to reveal the full extent of the factors affecting their lack of use, including factors that they may have been less willing to admit to spontaneously and ones which are of secondary importance, but still vital to know about to inform digital inclusion activities.

The key barriers to use remain broadly the same as were stated spontaneously, although the proportions for some increase a great deal with prompting (for example need, privacy and cost). Overall, the extent of each barrier (aside from age) is shown to be much wider, with four in five non-users agreeing that they have a lack of interest or need (78 per cent each) and over half (55 per cent) feeling that they don't know how to / worry they will not be able to use the internet. Linked to this lack of skills, one in five (22 per cent)

feel that having no-one to help them is a barrier to their internet use. There is little difference between the proportions feeling that they have no-one to help them help set up equipment (18 per cent), use the internet (18 per cent) or choosing or setting up an internet connection (17 per cent), suggesting that it is largely the same people who would assist non-users with all of these aspects.

Prompting also shows the extent to which privacy and security concerns (41 per cent), cost (33 per cent) and lack of convenient access (33 per cent) are barriers. Health or vision difficulties affect one in five non-users (22 per cent). Almost one in ten (nine per cent) face a literacy problem, lacking confidence in reading or writing, and a very small proportion (three per cent) face a language barrier.

Considering the proportions stating each of these barriers, it is clear that the vast majority of non-users face multiple barriers to getting and staying online: in fact, three in five (59 per cent) have four or more barriers.

Given this landscape of multiple barriers, it is important to understand which are critical and which are secondary. To some extent, this can be understood by the barriers stated top-of-mind by non-users: the fact that lack of interest / need and lack of skills are the top barriers both spontaneously and after prompting clearly shows that these issues are vital to address.

For targeting interventions, it is also helpful to consider various barriers together, to give a sense of what proportion of non-users fall into each of these broad groupings. Table 3.1 shows three broad (overlapping) groups of non-users, and the definitions of which barriers fall into each.

Table 3.1 - Barriers to internet use - broad groups

'Hard' constraint	The cost is too high	56%
	You do not have convenient access to the internet	
	You have health or vision difficulties	
	You lack confidence in reading or writing	
	There is a language barrier stopping you	
'Soft' constraint	You do not know how to use the internet or worry you won't be able to	74%
	You are worried about privacy or security	
	You do not have anyone to help you use the internet	
	You do not have anyone to help you choose or set up an internet connection	
	You do not have anyone to help you set up a computer, laptop, tablet or smartphone	
Choice	Don't want to use the internet	91%
	Don't need to use the internet	
	Have people to help us if we need to use it	

From this analysis, it is clear that a lack of interest is a factor for nine in ten (91 per cent) non-users. This is likely to put them off seeking help to overcome any further constraints they face and indicates that a pro-active approach is likely to be needed, with outreach work seeking out non-users at places they visit.

The 'soft' constraint grouping shows that three-quarters of non-users (74 per cent) have needs that can be addressed through training or one-to-one support (skills, privacy concerns, someone to help with setting equipment up),

although the vast majority of these also have a fundamental lack of interest which is the first thing to overcome.

Finally, the 'hard' constraint grouping shows that over half of non-users (56 per cent) are affected by obstacles, which may be much more challenging to overcome – cost and related access issues, health or vision difficulties or language / literacy barriers.

Those of working age are particularly likely to face 'hard' constraints (66 per cent compared with 52 per cent of those aged 65+), as are those with a limiting illness (62 per cent with compared with 48 per cent without) or living in a more deprived area (61 per cent compared with 46 per cent non-deprived). Those very or fairly interested in using the internet in the future are also more likely to be facing a 'hard' constraint (73 per cent compared with 52 per cent not interested).

When non-users were asked how likely they were to become an internet user in the next six months, only 10 per cent felt they would be very or fairly likely to do so, with the majority in not at all likely (71 per cent). This suggests that non-users find it hard to envisage overcoming the barriers they face to internet use.

3.1.3 Reasons for stopping using the internet

Those who are not current users of the internet but have used it in the past were asked why they stopped using the internet. Although reasons were generally in line with overall barriers to internet use (and it must be noted that the base size is low), it is notable that the top two reasons are the constraint of ill health (18 per cent) and due to a change in personal circumstances – retiring or stopping working (17 per cent) rather than explicitly due to a lack of interest or need (although it should be noted that some of those choosing not to continue using the internet after retirement no longer feel a need to do so as well as some who no longer have access).

I went into hospital for a while and haven't bothered since due to ill health.

Male, 73

After spending seven hours a day on a computer for work, I don't want to do it anymore.

Female, 77

My kids, who were the only ones who helped me with the net, moved out.

Female, 62

3.2 Lack of interest / perceived need

As discussed in section 4.1, lack of interest or perceived lack of need is the reason the digitally excluded are most likely to give to explain why they are not already online. Some have a dislike of technology, or are resistant to the social change it represents;

It just doesn't interest me . . . I think we did OK before it came about.

Female, 58

I'm a bit annoyed with the use of modern technology. Internet banking is taking away people like myself the ability to come to their own village and go to the bank . . . local ones have closed.

Female, 68

I've got no interest, I don't really like machines, I don't even like the telephone.

Female, 58

Whilst others associate using computers with work and prefer to avoid them during their leisure time;

I'm not going to sit there all day looking at computers, I would rather be outside. I think they're a waste of time.

Female, 67

This includes a proportion of non-users who can be considered 'active rejecters', who are fully capable of using the internet but who prefer not to do so;

Having spent about 30 years designing computer systems (in the nineties before the internet) I'm retired and . . . the last thing I want to do is look at a computer screen

Male, 68

I used computers for many years, and when I retired I said I wanted nothing more to do with them . . . My wife uses it a lot and finds it very useful, we have a decent Apple PC, but I don't wish to [use it].

Male, 67

Amongst those who think they don't need to use the internet there is some acceptance that they may need to in future, or that others will access it on their behalf;

I haven't really needed to, but the way things are going I probably will get it soon.

Female, 82

If we need to buy anything online our kids do that for us.

Male, 68

All non-users were asked how interested they were in using the internet in future. Around one in six (17 per cent) felt they would be very (five per cent)

or fairly (12 per cent) interested in using the internet in future, with over four in five (82 per cent) not very (23 per cent) or not at all (59 per cent) interested in doing so.

Younger age groups were more likely to be interested in using the internet in future (29 per cent of under 65s and 22 per cent of 65-74s compared with eight per cent of 75+s) as were those with qualifications at level 2 or above (26 per cent compared with 13 per cent less qualified). It is also the case that the level of interest among former users for getting online was higher than among those who had never used the internet (28 per cent compared with 15 per cent), suggesting that encouraging internet use to be resumed is an 'easier sell' than encouraging non-users to try the internet for the first time. .

3.2.1 Benefits of offline compared with online worlds

To further explore the reluctance of some people to get online further, all new users and non-users were asked on an unprompted basis what they feel are the benefits of carrying out certain tasks, such as accessing services, buying things and communicating with people, offline. The key benefit perceived is that such personal interaction helps maintain a social life (29 per cent) and provides welcome face-to-face contact (14 per cent).

It just gets you out and about, I live in a pretty isolated place - if I stayed online I would never see anyone.

Female, 65

Retired life can be boring, especially during the winter. It's easy to spend too much time indoors at home, so I like to go out in the car.

Female, 71

It's a better service, more personal. You get a bit of rapport - the internet is a bit cold.

Male, 36

The offline world was also associated with less risk – a feeling that it allows you to ‘see what you are buying’ (19 per cent) and avoid fraud or personal or bank details being stolen (nine per cent).

I prefer purchasing offline, to see what I'm getting before I buy it. I want to ensure the item is really what I want. I found up to now that looking at a picture of something on the internet can sometimes be misleading. Information can be missing on the website about the product.

Male, 65

I buy locally then I know if anything is wrong I know where the shop is and go and deal with it.

Male, 75

When buying something I'd rather know where it's coming from, and the person that's actually selling it.

Female, 40

You hear a lot of things about cons on there [the internet]. . . I don't really trust it to be honest . . . A lot of things can go wrong when you buy online. There are unscrupulous people about.

Male, 54

Only a very small proportion (three per cent) felt that the offline world allowed tasks to be completed quicker / more easily, suggesting that non-users as a whole may be open to the promotion of these factors as benefits of internet use.

Perhaps surprisingly, new users of the internet were more likely than non-users to cite personal interaction (47 per cent compared with 23 per cent), and face-to-face contact (21 per cent compared with 12 per cent) as benefits of the offline world, indicating that appreciating the benefits of offline contact is no barrier to starting to use the internet and those who may enjoy offline

shopping for clothes or food may still choose to purchase other non-tangible items such as insurance or airline tickets online.

To be truthful, there are certain things you can buy like car insurance over the internet, I will agree, but buying goods and things, why not go out to the shops, have a day out?

Male, 70

It was also the case that the internet was widely perceived as having some benefits by both new users and non-users. The key benefits were felt to be:

- Being able to make purchases online (36 per cent), often mentioned as useful for those who were unable to leave the house but also for finding items unavailable locally
- Being able to search for information quickly and easily (26 per cent)
- Being able to keep in touch with friends and family (20 per cent)
- Finding out about things you are interested in (16 per cent)
- Saving money by being able to access cheaper deals online (11 per cent)

“[You] can find unusual things you can’t find in the shops and they will deliver it for you”

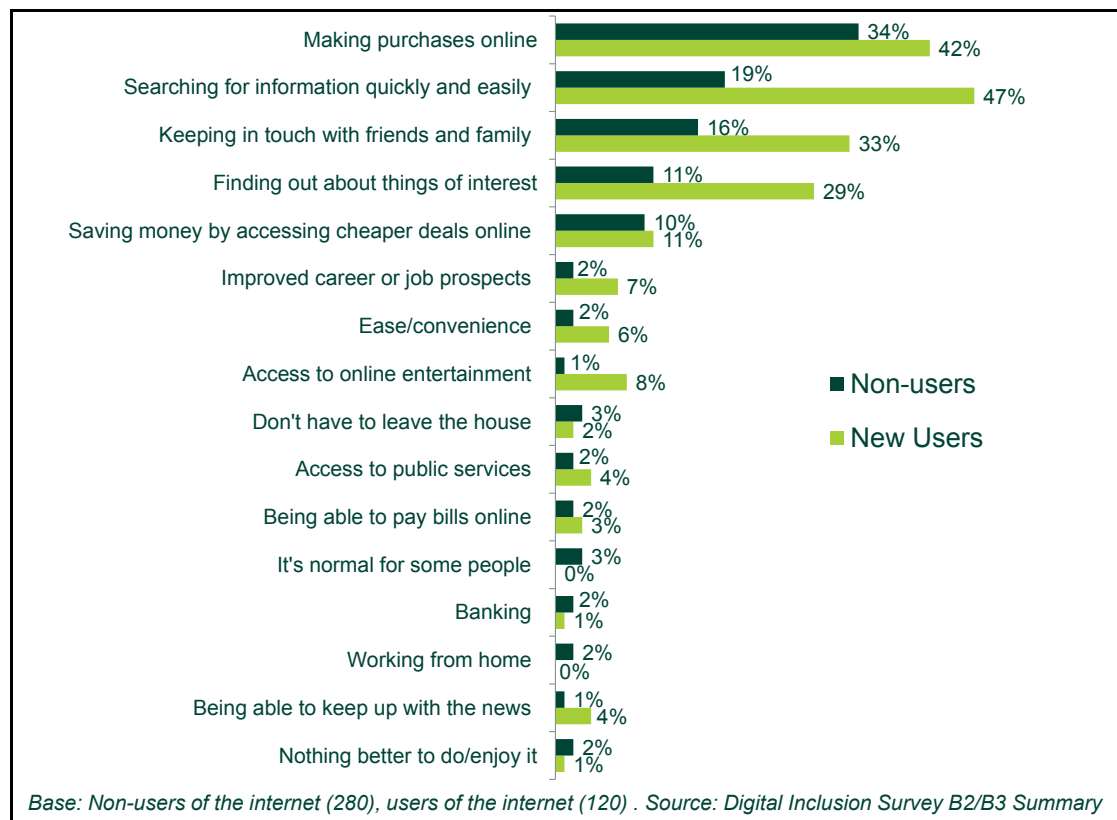
Male, 66

[It’s] easier to compare financial products, e.g. insurance.

Male, 44

Figure 3.2 shows how this breaks down by new users / non-users. As it shows, new users were ready to recognise a wider range of benefits than non-users. Non-users were as likely as new users however to recognise that possibility of saving money by being able to access cheaper deals online (10 per cent non-users compared with 11 per cent new users).

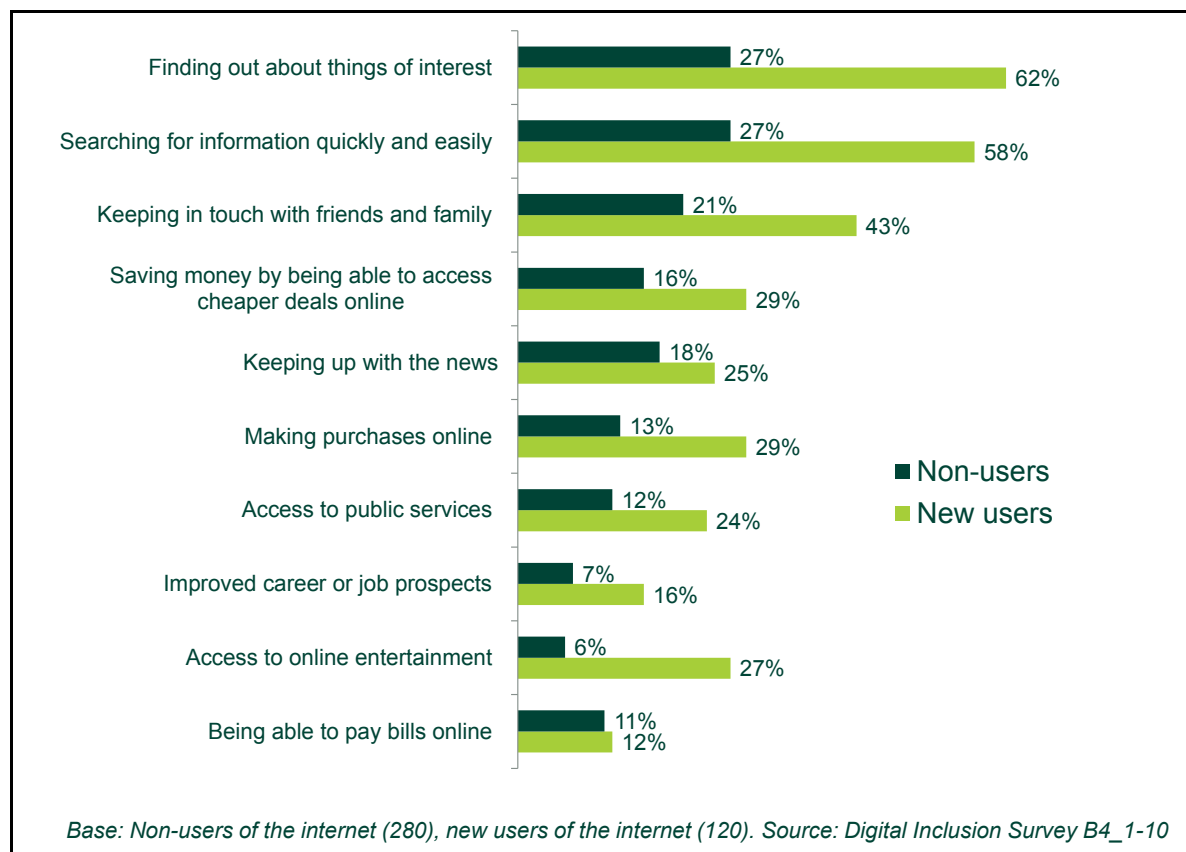
Figure 3.2 - Perceived benefits of being online



For each of the benefits they recognised, new users and non-users were asked how much it motivated them or would motivate them to use the internet – with those answering ‘a great deal’ or ‘a fair amount’ shown by Figure 3.3. In a similar pattern to the recognition of benefits, new users are motivated by a greater number of aspects of the online world than non-users, however the top five motivating factors are the same for both groups – making purchases online, searching for information quickly and easily, keeping in touch with friends and family, finding out about things of interest and being able to access cheaper deals online.

Being able to make purchases online was only actually motivating to 13 per cent of non-users who saw it as a benefit, despite it being the most widely recognised benefit among this group. This may be linked with concerns around online payments raised by many non-users. Areas least likely to motivate non-users were improved career or job prospects (seven per cent of those who identified it as a benefit) – probably linked to the fact that many non-users are retired - and access to online entertainment (six per cent). The latter though was motivating for 27 per cent of new users who saw it as a benefit, suggesting that entertainment tends to be an added benefit once online use is established rather than acting as an initial ‘pull’ factor.

Figure 3.3 - What does / would motivate you to get online



To further explore perceived benefits / attitudes towards the internet more broadly, non-users were prompted with three attitude statements. Substantial minorities of non-users felt that:

- Being online would 'increase my general confidence' (30 per cent)
- 'I am missing out on things by not being online' (28 per cent)

Those with a limiting illness were particularly likely to feel that being online would increase their general confidence (36 per cent compared with 23 per cent without an illness).

Those living in social housing were more likely to feel that they were missing out on things by not being online (38 per cent compared with 24 per cent not in social housing), as were men (36 per cent compared with 21 per cent women).

The message that the internet is for everybody also may need re-emphasising as almost two in five (37 per cent) agreed 'I don't feel that the internet is for people like me', with men particularly likely to feel this way (50 per cent compared with 26 per cent women).

Key take out: Advertising or outreach work needs to promote the benefits of going online, perhaps giving practical examples of simple things which can be done safely online as a starting point, as there is a lack of interest and insufficient motivation to benefit from the internet amongst many non-users which need to be addressed before they would be willing to learn or use more advanced functions.

3.3 Lack skills / knowledge or confidence

Concern around not being able to use the internet is the second greatest barrier to getting online, behind only a lack of interest, as outlined above in section 4.1. Just over half (55 per cent) of non-users do not know how to use the internet or worry they will not be able to.

The children did it, staring at a screen - it seemed to be one problem after another - they kept losing work, it was all lots of dramas about losing work - it's just not for me.

Female, 70

I think I'm a bit old to try learning now. I'm 78 so I don't know how quick my brain works these days.

Female, 78

If I get a computer and I press the wrong button I'll get the police in my house saying I'm a paedophile. I'm scared of computers.

Male, 44

I couldn't handle it, it's very confusing

Female, 63

Younger non-users were more likely to report not knowing how to use the internet or worrying they will not be able to, two thirds (65 per cent) of those under 65 did so compared with just over half (52 per cent) of older non-users. This lack of confidence in learning a new skill may be associated with younger non-users being more likely to have concerns about literacy, see section 4.7 below.

As would be expected there is more apprehension about not knowing how to use the internet amongst those who have never used it (a reason for 58 per cent), although perhaps of more concern is that it is still a barrier amongst two fifths (39 per cent) of those who have tried it at some point in the past indicating some may have been daunted and so discontinued their use, or perhaps did not have the opportunity to use it to any great extent.

As discussed in section 2.2.2, even amongst those who have used the internet, there are significant minorities who lack confidence in all types of internet use and confidence is particularly low in being able to set up a new device or a home broadband connection. Loss of a connection or device could therefore easily result in new users ceasing to use the internet.

Key take out: For the majority of non-users very low confidence levels need to be initially addressed by one to one support in the most basic aspects of using computers and going online. However, new users should not be forgotten in the help on offer as continued support will help build confidence and reduce the risk of them stopping using the internet

3.4 Privacy or security worries

Privacy and security are not 'top of mind' barriers to going online with just six per cent of non-users spontaneously mentioning they 'do not trust' the internet or think it is open to abuse (e.g. invading privacy, hacking, identify theft). However, when prompted, 41 per cent agree privacy or security concerns are at least a contributing factor in them not using the internet. The difference in these two figures suggests that such concerns may be hard to admit to and are therefore important to address.

I don't trust it. You hear about all these internet crimes, a lot of dodgy people out there who are clued up on computers, they could easily access my account.

Male, 56

Privacy and security are more likely to be a concern for younger non-users (47 per cent compared with 39 per cent of those over 65), they are perhaps more likely to consider using social media sites or online banking which would be more liable to problems of this type.

I think it's a bad thing in lots of ways. I think people are putting all this information on the internet, and whenever you read the papers you see about information put on Facebook and such, and I don't want to be part of that club.

Male, 70

Amongst non-users who are concerned about privacy and security by far the most common worry is that others may be able to obtain their bank / credit card details (61 per cent), followed by others being able to obtain their personal details (31 per cent).

I'm about to buy a new computer, and then I hope to get connected. I must admit I am nervous about hackers and things.

Female, 70

I'm a private person . . . and wouldn't want anything going on the internet like my personal details.

Male, 75

They are gathering your personal info to give to other businesses then you get loads of junk mail coming through.

Female, 71

Around one in six (16 per cent) were anxious that others would be watching what they do or 'keeping tabs' on them. Men were more likely to be concerned about this (25 per cent compared with 10 per cent of women).

A small proportion (four per cent) were concerned about picking up viruses on their devices.

Key take out: Although it may not always be explicitly stated by non-users, worries about privacy and security affect a significant proportion of them, indicating a key area to be addressed through outreach work and other sources of help. Reassurance from financial institutions, online retailers and service providers on their fraud prevention measures and independent guidance on safe online banking and shopping practices may help.

3.5 Cost and access

Lack of access (including due to cost) is the most notable non-attitudinal barrier to getting online. After prompting, a third of non-users (33 per cent) agreed that high costs were a barrier to them using the internet, whilst only a quarter (24 per cent) said they do not have convenient access to the internet. Together, either cost or access are barriers for half of non-users (49 per cent).

I haven't got the money to buy a computer and everything else that goes with it. I never seem to have the money to buy one, it's not that I don't want one, it just I never seem to have the money to do it.

Female, 63

I don't have a computer or a laptop . . . I know there are advantages, if I could afford to buy a computer I would.

Female, 66

To be honest its unaffordable at the moment, I've looked into Sky and BT and others but they haven't been in my range - that's the only reason. If they made it affordable I would use it as much as I did before.

Male, 66

Younger non-users are more likely to feel cost is an issue (41 per cent of those under 65 compared with 30 per cent of those 65 or over). It is also clearly a major issue amongst poorer non-users with those who live in more deprived areas twice as likely to find getting online too expensive (42 per cent compared with 19 per cent of those who are less deprived).

A slow connection (and the cost / perceived complication of upgrading to broadband) may well be a factor in some former users stopping their internet use as having a home broadband connection was far less common amongst those who had used the internet at some point but are no longer doing so (62 per cent rather than 82 per cent amongst new users), with older dial up connections more likely to have been used by this group (11 per cent compared with one per cent of new users) as referenced above in section 3.3.

3.5.1 Perceived cost and affordability of access

Amongst non-users who find costs to use the internet too high the main concerns are the cost of equipment such as a computer, laptop or tablets (for 58 per cent) or the cost of a home internet connection (for 55 per cent). Only four per cent were concerned about the cost of a mobile internet connection, indicating that they already have this and / or that this is not how they would want to access the internet. Installation or maintenance costs are not a concern (mentioned by only four per cent).

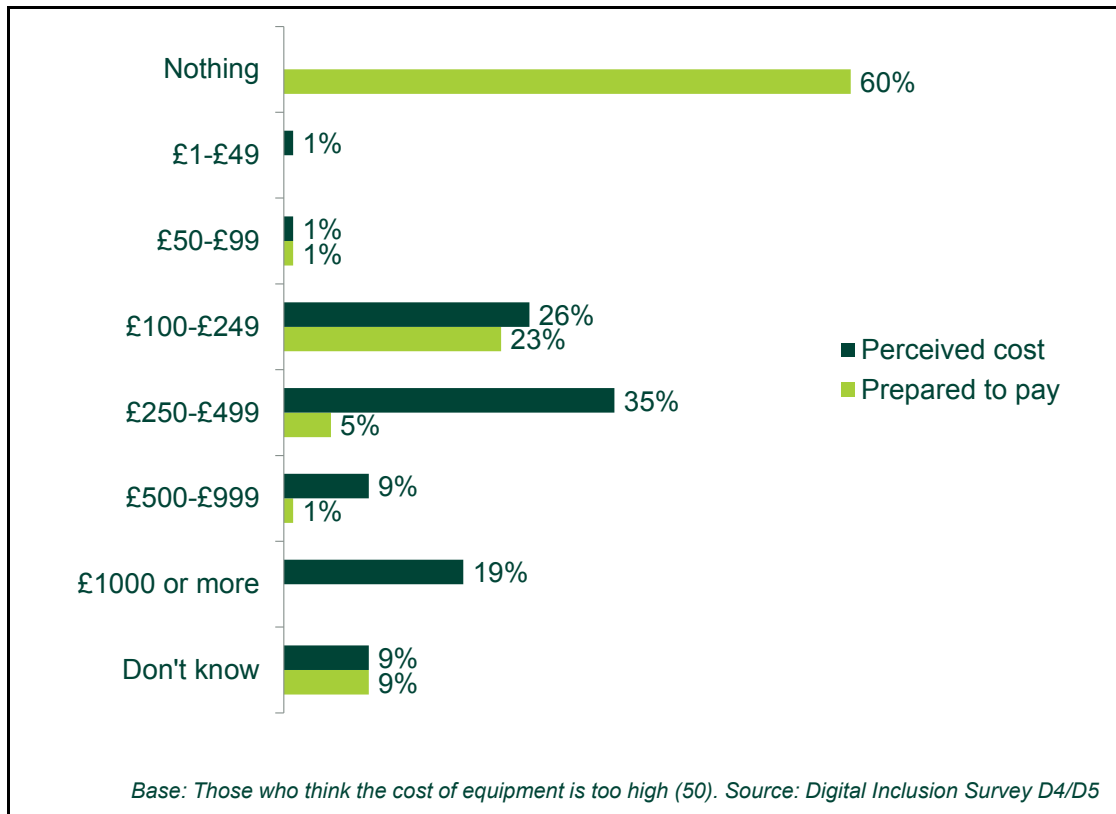
On average those who do not access the internet because they think the cost of equipment is too high, perceive it to be £482, although there is considerable variation in expectations, as shown in Figure 3.4. Although a quarter (26 per cent) place it between £100-£249, as many as 19 per cent unrealistically think equipment would cost over £1,000. It appears that the awareness of low cost tablets (some priced around £80) is low, and many are unaware that laptops are also available for around £200. A smart phone might of course also be a potentially lower cost alternative (often requiring no upfront cost).

When asked how much they would be prepared to pay for such equipment, there was more consensus: the majority of non-users who consider the cost of equipment too high (60 per cent) would not be prepared (or are perhaps unable to afford) to pay anything at all for equipment. To some extent this reflects a lack of interest, indeed the proportion who would not be prepared to pay anything for equipment rises to 74 per cent amongst those who are not interested in using the internet in future. Amongst those who consider the cost of equipment too high but are interested in using the internet still 22 per cent would not be willing (or perhaps are unable) to pay anything for equipment.

On average those who would be willing to incur some cost⁹ would be willing to spend £199 on equipment; as indicated above this would be sufficient for a basic tablet or laptop.

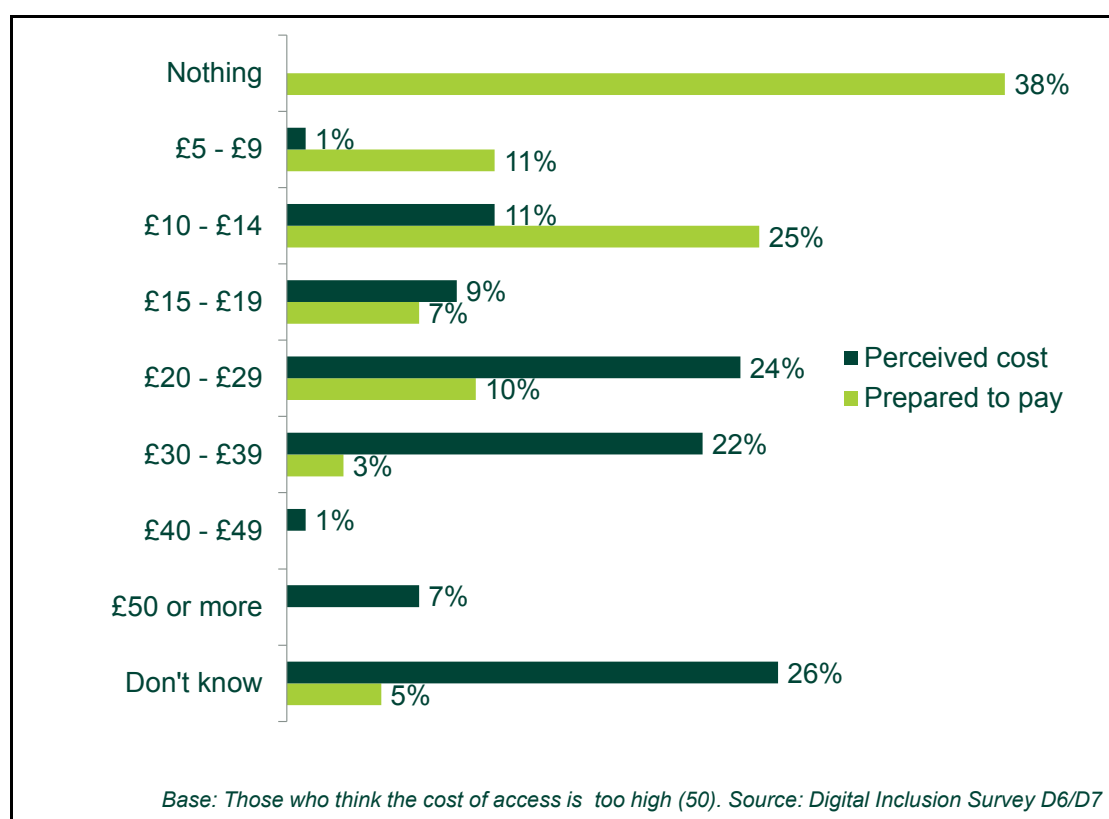
⁹ i.e. with 'not prepared to pay' excluded from the mean.

Figure 3.4 - Perception of equipment costs



Non-users who consider the cost of a home or mobile internet connection to be too high thought the charge would be £27 per month on average, with a quarter (26 per cent) unsure of what the cost might be. As Figure 3.5. shows, both price expectations and price prepared to pay were somewhat spread, which may reflect a lack of knowledge in how much they 'should' be paying for an internet connection.

Figure 3.5 - Perception of access costs



Two in five of those who find costs too high (38 per cent) would not be prepared to pay anything at all for a connection. Again, this tends to reflect a lack of interest in the internet so over half (56 per cent) of those who are not interested in using the internet in future would not be willing to pay anything at all for a connection, but this is the case for only three per cent of those who are interested but find the connection cost too high.

On average those who would be willing to incur some cost would be willing to spend £14 per month on a connection. Although home broadband is available for less than £20 a month, including line rental (which some will already pay for), this will still be a barrier for some.

In summary, where non-users who find the costs of internet use too high are willing to pay anything at all for ensuring access, they are on average prepared to pay enough for equipment (with £199 enough for a tablet or basic laptop), and may be prepared to pay enough for access (£14, although the

pricing of broadband, as it is often bundled with other telecoms services, is difficult to disentangle to give an average cost with confidence).

Among those interested in using the internet in future, there are a higher proportion not willing to pay anything at all for equipment to access the internet (22 per cent) than for connection (three per cent), suggesting a higher level of concern about upfront costs.

Key take out: Assistance with costs for equipment (perhaps a credit union loan to spread the cost) may help those who would like to use the internet but would struggle with a high initial cost. Non-users should also be made aware of the cost of equipment such as tablets or laptops as these are often perceived to be more expensive than they are.

3.5.2 Use of public internet venues

The alternative to having personal equipment and connections is of course to use a free public venue. Only around a third (36 per cent) of those who do not use the internet because of cost or access issues are aware of local venues which provide free access.

Former users were twice as likely as those who had never used the internet to be aware of these (60 per cent compared with 30 per cent), and indeed over a third of these former users (35 per cent) had made use of them when they did access the internet. Venues used included libraries, community centres and cafes. It is those who have never been online who are not being reached by public venues.

Amongst those whose barriers to use relate to cost/ access but have not made use of the free access they are aware of, the majority (77 per cent) feel they are unlikely to decide to use them in future. This is usually because cost / access is not the main barrier (they either do have access elsewhere such as

via a family member, they are not interested in going online, have concerns around privacy or are unsure if there would be help available).

I don't see why I should do that [use a public venue to access the internet] when I can get family member to sort it out.

Female, 77

I think it's a case of being confident. If I'm at home I would be more relaxed doing it myself.

Male, 60

Privacy reasons, that sort of thing.

Male, 64

Key take out: Promoting venues where access is free should focus on reaching those who have never used the internet before as former users are more likely to already be aware and / or not require free access.

3.6 Health or vision difficulties

Over one-fifth (22 per cent) of digitally excluded respondents cited health or vision difficulties as a reason for why they do not use the internet at present. Individuals aged between forty-five and sixty-four (31 per cent), those with a limiting illness (34 per cent) and those who are not employed (24 per cent) are the most likely to have identified an issue with their health or vision as a barrier to internet use.

Within the group of individuals who are digitally excluded due to problems with their health or vision¹⁰:

¹⁰ The base size here is fairly low, consisting of 57 individuals. On an unweighted basis, this means that the number of people in each category is as follows: eyesight issue (27), neurological problem (10), restricted movement (5), dyslexic (4), lack of confidence (4), memory problem (3).

- Over half (53 per cent) have an issue with their eyesight (e.g. glaucoma, cataracts);
- 17 per cent have neurological problems (e.g. Multiple Sclerosis, the after effects of a stroke);
- 14 per cent have conditions which cause restricted movement (e.g. Arthritis, Fibromyalgia);
- Nine per cent are dyslexic;
- Four per cent lack confidence, which they attribute to an issue with their health;
- And three per cent suffer with memory problems (e.g. Alzheimer's, Huntington's disease).

Those affected by these distinct health and vision difficulties are limited in their ability to access the internet for different reasons. Individuals with eyesight difficulties are unable to use the internet because their visual impairment makes it difficult for them to focus on a screen, be it a computer monitor, tablet or smartphone.

Glaucoma makes it difficult as lights hurt and strain both eyes.

Female, 6

*I have poor eyesight and so can't look at flashing images.
The brightness of the screen might be a problem.*

Female, 55

Those affected by neurological problems and those with restricted movement find it difficult to use the internet due to being limited in their ability to use the associated hardware.

I had a stroke and so have no feeling in fingers and very poor coordination sometimes which makes using a mouse difficult.

Female, 79

I suffer from a degenerative spine disorder and arthritis in my hands. I get cramp in my hands if I write, or pressing things.

Male, 48

Those who experience problems with their memory have difficulties with using the internet because an inability to retain and recollect information makes it hard for them to learn how to use the internet.

One day I would be sat at a computer and not know what to do. I could be told what to do and the next day can't remember what to do

Female, 71

Dyslexia and its role in digital exclusion is discussed in the section on literacy and language barriers.

3.6.1 Accessibility options

There is a range of accessibility options available, which are designed to help people with health and vision difficulties access the internet more easily. The awareness of applications which are designed to enhance accessibility is relatively high amongst those who accredit their digital exclusion to health or vision difficulties, with four-fifths (80 per cent) aware of at least one of the five

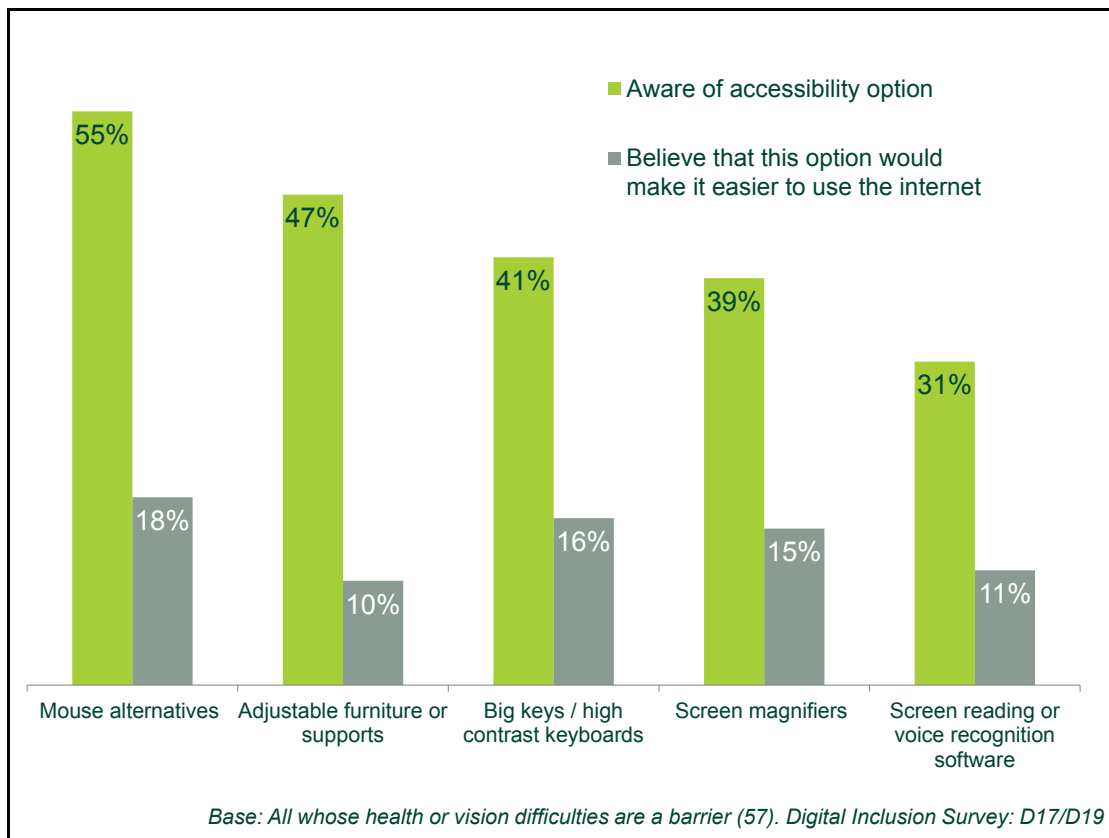
accessibility options presented to them¹¹. As illustrated in figure 3.6, the most well-known accessibility option is mouse alternatives, such as touchscreens and touchpads, with over half (55 per cent) aware that such technology exists. The accessibility option with the lowest level of awareness is screen reading or voice recognition software, but this is still known about by just under a third of the individuals with health or vision difficulties (31 per cent).

Despite a high level of awareness around accessibility options, only a third (33 per cent) of individuals feel that one or more of these options would make it easier for them to use the internet. Non-users in employment (80 per cent), as well those aged under sixty five (46 per cent) and men (57 per cent) were the most likely to believe that accessibility options could aid their use of the internet.

Accessibility options are most likely to be considered useful by those facing health or vision difficulties who also have prior experience of using the internet or who have an interest in using the internet in the future. Just under three quarters (74 per cent) of those who had used the internet in the past and almost nine-tenths (87 per cent) of those who identified themselves to be quite or very interested in using the internet in the future think that an accessibility option would make it easier for them to use the internet.

¹¹ Screen reading or voice recognition software; big key keyboards or high contrast keyboards; screen magnifiers; adjustable furniture or supports; and mouse alternatives (e.g. touchscreens and touchpads).

Figure 3.6 - Awareness and usefulness of accessibility options



As well as depicting the proportion of individuals who are aware of accessibility options, figure 3.6 also presents the proportion of individuals with health or vision difficulties who believe that each accessibility option would make it easier for them to use the internet. Each option was felt to be useful by between one tenth and one fifth of non-users with health or vision difficulties, with screen reading or voice recognition software and adjustable furniture or supports felt to be useful by the fewest (11% and 10% respectively). It also suggests that it is not lack of awareness which is the primary reason accessibility options are not always taken up. It is of course the case that not all accessibility options will be relevant for everyone with a health or vision difficulty, with needs very much depending on an individual's particular condition. There may also be further factors at play such as the perception of how much such accessibility options cost.

“People say you can buy ones which talk to you but that costs money – it will cost you £1000 and I can’t afford it”

Female, 49

Health and vision difficulties can take various forms and so, although hardware modifications and software applications may enhance accessibility for some, others will require a greater degree of support and coaching and a few may simply never be able to use the internet unaided.

Those who do not think an accessibility option would be useful are most likely to be those with no prior experience of using the internet. For these individuals, accessibility options may in theory enable them to use a computer but such options alone may be insufficient and further support is likely be required.

Key take out: Awareness of some accessibility options could be raised further – most notably in the case of voice recognition or screen reading software – but a lack of awareness does not appear to be the key reason that accessibility options are not always taken up. It may be that awareness is at a superficial level rather than a more detailed knowledge and that being shown how the option works would be beneficial and drive usage. It may also be that the cost involved (either real or perceived) is off-putting to some.

3.7 Language and literacy barriers

Just under one tenth (nine per cent) of all non-users mentioned a lack of confidence in reading or writing as a reason for their digital exclusion. Trouble with reading and/or writing impairs the ability of individuals to use search engines, understand information on websites and communicate with others via email or social media. Those under the age of 65, specifically those between the ages of 25 and 44¹², were the most likely to be restricted from

¹² No interviews were completed with non-users aged 18-24

using the internet by literacy barriers (21 per cent and 35 per cent respectively).

The three most pronounced literacy barriers facing the digitally excluded are difficulties with spelling and writing (35 per cent of non-users who feel literacy is a barrier to using the internet); difficulties with reading (32 per cent) and learning difficulties (16 per cent).

Such literacy barriers not only make it complicated to use the internet but also foster apprehension about attempting to use it:

It makes it a bit awkward to do these things yourself. I'm not a very good reader, and I'm not a very good writer to be honest. If you're not a good reader then it would be awkward to use a computer or a laptop or anything like that. You lack confidence.

Female, 70

All non-users who accredited the literacy barriers they face to a learning difficulty identified themselves to be dyslexic. This cognitive disorder impacts upon the literacy of individuals to varying extents, but in general limits the ability of those affected to engage with the internet due to difficulties with processing written language.

In addition to literacy barriers, three per cent of non-users feel that a language barrier is stopping them using the internet. The most pronounced of these barriers is a lack of understanding of the terms and abbreviations sometimes used online e.g. 'text speak'. Some individuals think that unfamiliarity with such online language, or with computer jargon / technical terms, will make it hard for them to engage with the internet or communicate with others online:

Using abbreviations, that is where I'd look at something and think I don't know what that means. This is what happens in the modern age, they cut things down.

Female, 68

I wouldn't go online- mainly because of spelling- then there's all these codes and hashtags you have to put in that I don't understand.

Female, 61

Other language barriers that obstruct individuals from using the internet include mentions of dyslexia and being more confident reading and writing in Welsh than English: the latter may indicate a lack of awareness that Welsh language websites and translation applications exist online.

Key take out: Support offered to those starting to use the internet should take literacy barriers into account, for example by making sure any text-based materials, such as written guidance notes or online tutorials, uses simple words and phrases and, where possible is in large font (as poor vision may play a part for some of those citing reading difficulties). Courses or one-to-one sessions should also ask learners if they are unsure of any terms used online, and explain these to them where desired.

3.8 Awareness of help

Amongst non-users there is low awareness of potential sources of help, with half (51 per cent) unaware of any person or programme which could help get them online and develop their internet skills. Women were less likely than men to be aware of any form of help (58 per cent not aware of any sources compared with 42 per cent of men).

The most common source to be mentioned was friends and family (25 per cent). Minorities mentioned more formal sources of help in the form of

community programmes (11 per cent), local library staff (11 per cent) or college courses (four per cent). Very small proportions (2 per cent or less) are aware of help from private sector programmes, charities, government programmes, Which? Magazine, or their workplace, indicating few of these programmes appear to be getting through to these digitally excluded audiences.

Amongst the half of non-users who are aware of help just under a third (31 per cent) had accessed it.

Help is more commonly taken up by those who are better qualified (50 per cent of those with a Level 2 qualification or higher compared with 13 per cent of those with lower level or no qualifications). This more qualified group are particularly likely to have mentioned friends and family as a potential source of help (by 31 per cent) and to have mentioned library staffs as potentially offering help (16 per cent).

Among those not accessing help (when aware it is available), 11 per cent find it hard to get to or use due to location, poor transport links or other accessibility issues, with a similar proportion (nine per cent) unsure how to find out details and one in twenty (five per cent) feeling that access to such help is only available at inconvenient times. However, for the majority of non-users who are aware help exists (80 per cent), these practical issues are not barriers to taking it up.

Key take out: Programmes and facilities available to help people access the internet need to be better publicised and targeted at non-users with very low confidence, there is low awareness of these resources.

3.9 Use of proxies

Overall, one in five (22 per cent) feel that having no-one to help them is a barrier to their internet use. This affects all groups of non-users, regardless of age or other factors. This breaks down into a similar proportion who feel that

they have no-one to help them help set up equipment (18 per cent), use the internet (18 per cent) or to choose and set up an internet connection (17 per cent).

Basic IT skills are the most common form of help needed, with half (51 per cent) of those who do not go online because of a lack of help saying they need help with general use of a computer, laptop, tablet or smartphone – this being the area of concern rather than the internet itself. There was no other issue raised very frequently (less than 10 per cent mentioned any other specific area with which they would like help).

Most would like a friend or family member to help them (64 per cent), and as mentioned above friends and family are frequently mentioned as potential sources of help but when explored in more depth there can be problems relying on personal contacts.

I have previously asked my son for help, but he wasn't interested in helping me, saying I would not understand how to do these things.

Female, 66

When my son was showing me how to put in the site, that took me about half an hour alone. I found that frustrating and my son was getting frustrated too as I was taking [so] long and I couldn't remember the steps my son had shown me . . . I had to keep stopping to ask.

Male, 52

It's quite frustrating when you get to my age- things take a longer time to sink in. When people are younger . . . [they] don't understand that we don't understand because it's second nature to them.

Female, 66

Some would prefer a teacher or tutor (17 per cent) to help than someone they know but only very small proportions raised that they wanted to get help from a local volunteer or mentor (two per cent) or via a course (two per cent).

Friends / family are top of mind as a source of help, with external help not immediately considered an option, however as discussed in section 4.10, there is demand for a range of sources of help among all non-users.

The majority of non-users (61 per cent) had never had anyone help them to access information or services online.

Where help had been given it was usually to access information on their behalf (31 per cent) rather than being helped to access information themselves (eight per cent). This may actually place a buffer between the user and the internet resulting in them not gaining sufficient confidence to use it alone.

Linked to this, help can also act as a barrier to the non-user getting online themselves with almost one in ten (nine per cent) saying they do not use the internet themselves as there is always someone available to help (usually a partner or son / daughter).

The odd things I need I let my husband or daughter do for me . . . / [It's] laziness knowing that someone else ... can sort things online for me.

Female, 64

We did have a computer and went to lessons in the local library – but . . . we have two members of the family who will find out info online that we need to know so we don't need to use it ourselves.

Female, 70

Half (52 per cent) of those who had been helped were 'happy to leave it to someone else'; although some indicated they would want to be able to do it themselves next time:

Absolutely brilliant, she was very patient. I had to have help, wasn't capable by myself.

Male, 56

I felt fine. As long as they show me how to do it myself after that's OK, I wouldn't want to keep asking them.

Female, 52

It didn't bother me, but I think I should have gone to computer classes, it would have made me better at the internet.

Male, 66

A fifth (20 per cent) of those who had been helped said they would have preferred to do it themselves or that they did not like to have to rely on others.

I would prefer to do myself, it keeps the brain ticking over. I don't want to leave personal stuff for other people to do.

Male, 65

I feel quite guilty. I know I'm behind, still in the 20th century- I'm always asking friends, they don't complain, but they could say 'why don't you buy your own?'

Female, 63

I feel it's a bit feeble on my part, I feel lost on my own

Female, 83

New users of the internet are unlikely to have helped anyone else to do so, with only 15 per cent indicating they had. Furthermore, those who had not done so were largely unaware of anyone living or working near them who they might want to help (88 per cent), indicating a peer approach may be unsuccessful amongst this specific group - as these are late comers to the internet they may not feel as confident in helping as other members of society (new users are often not confident enough for knowledge to snowball among peers).

Key take out: Encouraging IT literate friends and family to help non-users with basic skills and enabling them to access the internet themselves (rather than doing tasks for them) may help as the majority of non-users have never received any help. However, not all can rely on personal contacts and some would prefer external help.

3.10 What would encourage non-users to start using the internet?

More than half (56 per cent) of all non-users felt that 'nothing' would encourage or help them to get online in the future; this links back to the fact that for the majority a lack of motivation was stated as a key barrier to getting online (with 39 per cent saying they did not want to go online and 17 per cent saying they did not need to get online).

One in nine (11 per cent) stated that they would be encouraged to get online if they had training or someone to help them; in line with the finding that lack of skills is a key barrier (mentioned spontaneously by 25 per cent as a reason for not using the internet). Those who stated they were interested in getting online in the future were more likely to state that training would encourage them (37 per cent, compared with five per cent of those who had stated they were not very or not at all interested in getting online), again demonstrating the extent to which general motivation is a key factor. Additionally, one per cent stated that they would be encouraged to get online if they had more confidence.

Mastering it, doing it all the time ... [making] mistakes.

Male, 68

If somebody came along and helped me to learn how to use the computer. I think I need encouragement more than anything else.

Female, 68

Just if I had enough courage to start I suppose.

Male, 64

Six per cent mentioned greater affordability as a key factor which would help them get online, an equal proportion to those who stated spontaneously that cost was a barrier. Again, this was more likely to be mentioned by those who had already expressed an interest in getting online (26 per cent, compared with two per cent of those who had stated they were not very or not at all interested in getting online). On a similar note to affordability, four per cent said they would be encouraged to get online if they had or were given a computer, and one per cent said they would get online if it was free.

If you can buy me a computer that would be grand. I'm disabled and not working and can't afford to buy a computer.

Male, 52

Money [and] going into a shop, I wouldn't do it on my own. I don't know what to look for in a shop, I would have to be guided by my friends

Female, 63

Changes in health were cited as potential factors: four per cent stated that their health improving would help them to get online, while conversely one per cent said that if their health deteriorated they would be encouraged to get online (for example, in a scenario where they became housebound).

[If I had a] new body and a new brain.

Male, 60

If I couldn't get about would be one thing. If I was stuck in the home and needed to do things, it would be useful.

Male, 71

Some non-users indicated that they would need to be forced or pressured in order to get online: three per cent said they might do so if they lost the help of their partner or family member (who currently undertakes online tasks on their behalf), a further three per cent stated they would only go online if they were forced to, for example by needing to complete a form which can only be filled out online, and one per cent said they might go online if they needed to as part of a job, or if they were being paid to do so.

If my wife decided she wouldn't use it, then I'd have to.

Male, 67

There are some official forms you have to go online for. In the future I imagine that would make me start using the internet.

Female, 85

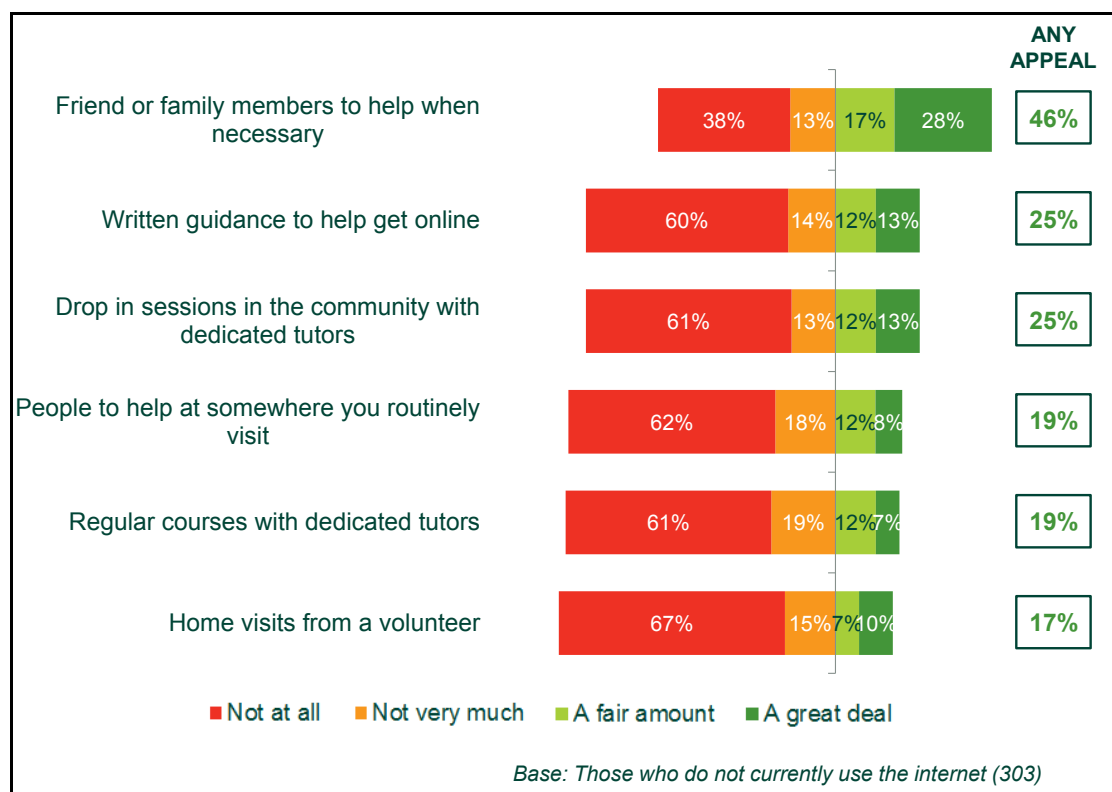
Finally, there were some mentions of 'softer' reasons; two per cent said they would be encouraged to get online if there was something that interested them in particular, for example, one respondent mentioned live streaming of

local sports matches, and another mentioned that being able to get a weekly supermarket shop delivered might encourage them to go on the internet: this indicates that encouraging non-users online can be a case of needing to find the one particular catalyst to ‘unlock’ their interest . A further two per cent said they might get online if they had more time – again, if fully convinced of the benefits of online use, it feels likely that this time could be found.

3.10.1 Attitudes to sources of help and training - prompted

When prompted with potential sources of help and training¹³, by far the most popular suggestion was having friends or family members to help when necessary, with nearly half of non-users (46 per cent) stating that this option would appeal either a great deal or a fair amount; this was followed by written guidance (25 per cent said this would appeal) and drop-in sessions in the community (25 per cent).

Figure 3.7 - Appeal of help for getting online



¹³ Note that this question dealt solely with training-related help; other types of help, for example help with costs, are covered elsewhere in the report.

Help from friends or family members particularly appealed to those non-users who might be expected to have a greater existing level of familiarity with computers and the internet, including 54 per cent of those aged under 65 and 61 per cent of those in employment. It was also more likely to appeal to those living in a rural area (60 per cent) and in less deprived areas (53 per cent).

Written guidance follows a similar pattern, being of more interest to those under 65 (36 per cent), those in employment (43 per cent), as well as those whose highest qualification is level 2 or above (35 per cent).

Similarly, several of the options were more likely to appeal to those non-users who had used the internet previously: help from a friend or family member appealed to 71 per cent of this group, written guidance to help get online appealed to 43 per cent, drop-in sessions in the community appealed to 37 per cent, and regular courses with dedicated tutors appealed to 33 per cent of former users.

All of the prompted types of help were more likely to appeal to those who stated that they were either very interested or quite interested in getting online in the future: 85 per cent of those who were interested in getting online said help from a friend or family member would appeal to them, written guidance appealed to 76 per cent, drop-in sessions appealed to 63 per cent, home visits appealed to 53 per cent, help in places they routinely visit appealed to 49 per cent and regular courses appealed to 48 per cent.

Key take out: The fact that potential sources of help related to training and support were more likely to appeal to those with existing experience of the internet and with higher levels of qualifications suggest that these types of training and support are likely to have a greater impact on those who are already closer to being digitally engaged.

In order to successfully reach the key target groups, it will therefore be necessary for the Welsh Government to initially focus on initiatives aimed at increasing motivation and changing attitudes towards the internet – this can often be a case of needing to find the one particular catalyst to ‘unlock’ their interest.

4 Conclusions and Recommendations

4.1 Conclusions

The 2013-14 National Survey for Wales found that 21 per cent of people did not personally use the internet. Among those interviewed in the re-contact survey discussed in this report (a sub-sample of those not using the internet at the time of the initial survey), almost a quarter (24 per cent) are now using the internet. This suggests that progress continues to be made against the Welsh Government digital inclusion targets.

This is encouraging, however, as time goes on, those not using the internet become harder to reach. Most non-users face multiple barriers to using the internet, with a lack of interest or need being a factor for a full nine in ten (91 per cent).

Over half (56 per cent) of non-users face a 'hard' constraint which stops them from using the internet, such as costs (33 per cent), a lack of convenient access (24 per cent), health and vision difficulties (22 per cent), literacy (9 per cent) or language (three per cent) barriers..

'Soft' constraints such a lack of skills, privacy or security concerns or a lack of help, affect three quarters (75 per cent) of non-users, however these constraints are arguably the most easily overcome with external help or peer support.

Awareness of existing sources of help is low, however, reflecting the lack of interest of most non-users.

4.2 Recommendations

On the basis of this research, the following recommendations are made:

1. Consider which groups are a priority for targeting outreach work towards – based not just on the existing priority groups (those in social housing, with a limiting illness, the unemployed and over 65s) – but on attitudinal barriers including whether ‘hard’ or ‘soft’ constraints are faced, and how these interact with lack of interest.
2. As lack of interest or perceived need is the key barrier to internet use, focus on initiatives aimed at highlighting the benefits of internet use and increasing motivation to get online – this can require finding the one particular catalyst to ‘unlock’ an individuals’ interest.
3. Programmes and facilities available to help people access the internet need to be better publicised. However, the extent of the lack of interest shown by those who do not use the internet also points towards the need for a proactive approach, with outreach work seeking out non-users at places they already visit rather than relying on them to seek help at public venues. As this is already a strategy of the Welsh Government, the recommendation is to continue this approach and to keep gathering evidence as to successful places to offer this help, and how to offer the help, given that considerable reluctance may need to be overcome (for example, it may be of interest to find out more about whether offering incentives could encourage non-users to give the internet a try).
4. Continue to address privacy and security concerns as part of sessions undertaken with those starting out online.

5. Raise awareness of the price of affordable tablets and laptops and, where relevant, raise awareness of affordable loans available through credit unions which could reduce the impact of upfront costs.
6. Encourage the IT literate to act as 'Digital Champions' and help any of their friends or family who do not use the internet with basic skills. Such help would be beneficial to non-users and should focus on enabling them to access the internet themselves, rather than doing tasks for them.
7. Consider literacy barriers when developing or reviewing text-based learning materials i.e. making sure any written guidance notes or online tutorials are presented in large enough font and use simple language.
8. If it is felt to be a group which would benefit from targeting, a small qualitative study following up those with health and vision difficulties about their attitudes to accessibility options – especially if any relevant options could be shown to research participants - would give further information on why certain options are not considered useful.
9. Consider the support offered to new users, who are still building confidence and could do with consolidating, and perhaps extending, their abilities to prevent them slipping back into non-use.

Appendix A - Technical report

5

5.1 Sampling and weighting

The sample source for the survey was the National Survey for Wales 2013-14 specifically individuals identified as non-users of the internet who had consented to be re-contacted for further research. The Welsh Government also provided a file of all individuals identified as non-users of the internet, without contact information, to allow comparisons to be made between the sample drawn and the full non-user population.

The population of internet non-users is primarily older (69 per cent were aged 65 and older at the time of the 2013-14 National Survey), and a relatively high proportion (50 per cent) lived with a lifelong limiting illness. More than a quarter (28 per cent) were living in social housing, while only a small proportion (two per cent) were unemployed (the majority being economically inactive i.e. retired, students, unpaid carers, long-term sick etc.).

The 2013-14 National Survey identified 4,038 non-users of the internet, of whom 1,877 agreed to be re-contacted for further research. The 1,877 available for re-contact had completed the National Survey between 10 and 22 months prior to the start of fieldwork; 1376 had completed the National Survey within 18 months, while 501 had completed it more than 18 months ago.

The target number of interviews to be completed was 400, and in order to achieve this, it was determined that a starting sample of around 1,000 records would be required, assuming a conversion rate of around 40 per cent (the number of completes as a proportion of all sample issued). Therefore, a sample of 1,000 records was drawn at random from the total available starting sample of 1,877.

However, in order to ensure that key groups of interest would be adequately represented, certain groups were oversampled in addition to the core sample of 1,000 records. Additional sample was drawn as follows, bringing the total sample to 1,259 records:

- All of the records available for the unemployed
- All of the records available for the under 45s
- 200 additional records in the 45-64 age group

Over-sampling these groups ensured more robust base sizes for conducting sub-group analysis.

Table 5.1 below shows the respective counts for the total population of non-users, all non-users available for re-contact, the total drawn sample of 1,259 records, and the total achieved interviews. Comparing the proportions of the achieved interviews against those of the total non-user population reveals the effect of the oversampling, with greater proportions of non-users aged under 65 and the unemployed represented in the survey population.

Table 5.1: Sample Counts

	Total non-user population		All non-users available for re-contact		Total drawn sample		Achieved interviews	
People with limiting illness	2,030	50%	898	48%	581	46%	168	42%
People in social housing	1,125	28%	503	27%	354	28%	96	24%
Unemployed	78	2%	50	3%	50	4%	21	5%
Age 18-44	257	6%	127	8%	127	10%	33	8%
Age 45-64	976	24%	511	27%	476	38%	177	44%
Age 65-74	1,130	28%	594	32%	322	26%	120	30%
Age 75+	1,675	41%	645	34%	334	27%	70	18%
TOTAL:	4,038	-	1,877	-	1,259	-	400	-

It was important to have all the key target groups in line with the total non-user population so the data were weighted post-fieldwork to ensure this was the case. As there was considerable overlap between the categories of interest, in order to achieve the closest match the data were weighted by age within social housing only / limiting illness only / both social housing and limiting illness / neither. A comparison of the unweighted and weighted profiles with the total non-user population is shown in Table 5.2 below. This shows that a very close match with the total non-user population was achieved through the weighting, with the only difference being that the weighted data slightly over-represent the unemployed (four per cent compared with two per cent of the population).

Table 5.2: Sample Counts

	Total non-user population	Achieved interviews (unweighted)	Weighted profile
People with limiting illness	50%	42%	50%
People in social housing	28%	24%	28%
Unemployed	2%	5%	4%
Age 18-44	6%	8%	7%
Age 45-64	24%	44%	24%
Age 65-74	28%	30%	28%
Age 75+	41%	18%	41%

Gender was allowed to fall out naturally, with a final weighted proportion of 47 per cent male and 53 per cent female, compared with a non-user population profile of 41 per cent male and 59 per cent female.

5.2 Response rates

Overall, 400 telephone interviews were completed between 5th and 27th February 2015. Table 5.2 below outlines a breakdown of final fieldwork outcomes. Those listed as 'no definite outcome achieved' were all records still in play (for example records that had not been called yet, or for whom an appointment had been set) when their relevant quota closed. 'Unusable' records include those for which the supplied telephone number did not work or had gone out of use, or was a business number.

Table 5.2 – Overall response rates

Final outcome	Records
Completed	400
Refused	325
Breakdown during interview	67
Not available during fieldwork	11
No definite outcome achieved	331
Unusable ¹⁴	125
Total	1,259
Total definite outcome¹⁵	803
Final response rate (<i>completes / usable sample</i>)	50%¹⁶

Looking at response rates split by key sub groups, the response rate was lowest among those aged 65 and over; this group also had the highest level of explicit refusals, indicating a greater unwillingness among this group to participate in the research. Response rates were also lower among those with a lifelong limiting illness; this could reflect health issues making it more difficult for these respondents to participate in the interview.

¹⁴ Including business numbers, non-working phone numbers

¹⁵ All with a definite outcome: completed, refused, breakdown, not available during fieldwork

¹⁶ As a proportion of all sample issued, the response rate is 32 per cent.

Table 5.3 –Response rates by key sub groups

Final outcome	Aged under 65	Aged 65+	Unemployed	Social Housing	Limiting Illness
Completed	210	190	12	99	168
Refused	79	246	8	74	172
Breakdown during interview	18	49	2	14	35
Not available during fieldwork	4	7	-	3	3
No definite outcome achieved	213	118	15	111	139
Unusable	79	46	13	53	64
Total	603	656	50	354	581
Total definite outcome	311	492	22	190	378
Final response rate (<i>completes / usable sample</i>)	68%	39%	55%	52%	44%

Response rates were fairly even between those that had completed the National Survey within the last 18 months, and those that had completed it more than 18 months ago, indicating that length of time since completing the original survey was not a barrier to completion; there was also no significant difference in the number of ‘unusable’ records within each group, suggesting that a greater time lapse between the original and follow-up interview does not lead to increased issues regarding changes of contact details.

Respondents were not asked whether they remembered participating in the National Survey, and recollection of the previous research was not a condition for participation in the follow-up survey. Respondents were also not prompted

with their previous responses about internet use so they were coming to the questions in this survey afresh.

Table 5.4 –Response rates by date when completed the National Survey

Final outcome	Within 18 months	More than 18 months ago
Completed	220	180
Refused	188	137
Breakdown during interview	38	29
Not available during fieldwork	8	3
No definite outcome achieved	190	141
Unusable	64	61
Total	708	551
Total definite outcome	454	349
Final response rate (<i>completes / usable sample</i>)	48%	52%

5.3 Comparison with National Survey for Wales

5.3.1 Barriers stated

The National Survey for Wales in 2013-14 also asked (on an unprompted basis) those who did not use the internet the reasons why this was the case. Their responses were then coded by interviewers to a list of precodes.

In the re-contact survey, after being asked on an unprompted basis the reasons why they did not use the internet, respondents were then prompted with a read-out list of potential barriers and asked to identify any that applied to them. Overall the list of barriers used is very similar to the list used in the 2013-14 National Survey, although some additional codes were added to explore further areas such as availability of help, literacy and language

barriers. The National Survey list does not contain a standalone item to cover 'lack of access', as instead the reasons behind lack of access were probed for (e.g. cost of equipment). However, in the re-contact survey, as respondents were being prompted with each barrier, the decision was made to include lack of access as well as the underlying reasons for this.

While the 2013-14 National Survey questionnaire listed 'don't want to use the internet' and 'don't need to use the internet' first, in the re-contact survey the equivalent codes were moved to the end of the read-out list; this was to prevent respondents or interviewers from using them as 'catch-all' codes, and making sure that any other underlying reasons were captured.

Table 5.5 below shows a side by side comparison of the list of barriers used in the re-contact survey and the list of barriers used in the National Survey in 2013-14.

The 2013-14 National Survey revealed that personal choice was the reason for not using the internet for the majority, with 61 per cent saying they don't want to use the internet and 40 per cent saying they don't need to use the internet. In line with the previous year, specific barriers such as lack of skills, equipment and access costs and health problems were also mentioned.

The top three reasons mentioned in the National Survey were also the top three reasons given in this survey: don't want to use the internet/not interested in using the internet, don't need to use the internet, and lack of skills/do not know how to use the internet or worry you won't be able to. However, this survey shows the true extent of these issues as respondents were prompted on them specifically.

This survey also reveals a number of additional barriers compared with the National Survey; again, this extra detail has been pulled out as respondents were prompted by interviewers to consider more possible reasons. Additional reasons picked up included lack of help (either to use the internet or to set up a connection or device), and other more general issues which could impact on

internet ability such as lack of confidence reading and writing or a language barrier.

Table 5.5 - Comparison of barriers listed

Digital Inclusion Re-contact survey (prompted)		The National Survey 2013-14 (spontaneous)	
The cost is too high	33%	Equipment cost is too high	5%
		Access cost is too high	5%
You do not know how to use the internet or worry you won't be able to	48%	Lack of skills	28%
You are worried about privacy or security	41%	Privacy/security concerns	1%
You have health or vision difficulties that make it hard for you to use the internet	20%	Health problems make it difficult	4%
You do not have convenient access to the internet	24%		
You do not have anyone to help you use the internet	20%		
You do not have anyone to help you choose or set up an internet connection	17%		
You do not have	18%		

anyone to help you set up a computer, laptop, tablet or smartphone			
You lack confidence in reading or writing	9%		
There is a language barrier stopping you	3%		
You are not interested in using the internet	75%	Don't want to use the internet	61%
You do not need to use the internet	78%	Don't need to use the internet	40%
Any other reason (SPECIFY)	3%	Other (please specify)	4%
DO NOT READ OUT: Don't know	1%	Don't know (SPONTANEOUS ONLY)	0.2%
DO NOT READ OUT: Refused	-	Refused	0.1%

5.4 Approach to including Welsh speakers

It was important that the research allowed Welsh speakers to participate in the language of their choice. Those who had originally completed the National Survey in Welsh or indicated in the National Survey that they were fluent in Welsh were identified prior to the beginning of fieldwork. These records were called by Welsh interviewers, but these interviewers initially mirrored the language used by the person picking up the phone, reflecting the fact that some household members might not be Welsh speakers.

At the beginning of the interview, all respondents were given the option of continuing in Welsh or English. If the interviewer was able to proceed in the

language chosen by the respondent, the interview would go ahead immediately; if a respondent requested Welsh while speaking to an English interviewer, the interviewer would flag the record as requesting a Welsh call back, and inform the respondent that a Welsh speaking interviewer would be in touch within the next few days¹⁷.

In the National Survey, three per cent of non-users of the internet were interviewed in Welsh, and a further seven per cent were identified as fluent in Welsh, but completed the interview in English.

In the re-contact survey, 24 interviews were completed in Welsh (six per cent of the total of 400 interviews).

¹⁷ Given that all those who stated they were fluent in Welsh in the National Survey were called by a Welsh interviewer, this scenario did not in fact occur during this survey.

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